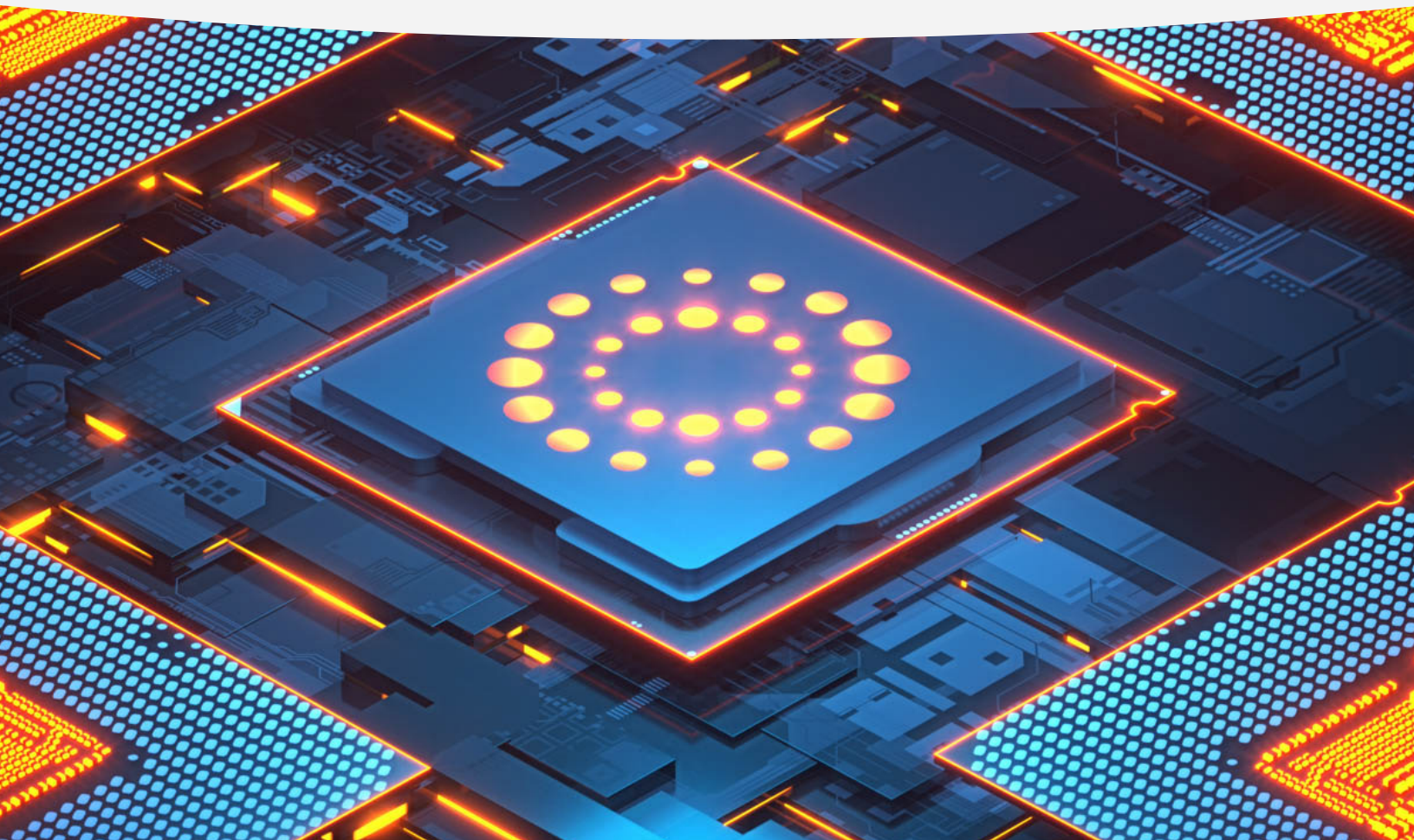


ARTIFICIAL INTELLIGENCE MOVES BEYOND THE HYPE

Tales from Momentum AI New York 2025

In association with **FACTSET**

August 2025



CONTENTS

Time for #realtalk in artificial intelligence	4
The challenge of AI adoption	5
Financial services firms show the way	7
How financial services is using AI technology	8
Elevating human capabilities with agents	10
Things to consider in deploying AI models	11
The key role of data in delivering AI success	13
The growing trend towards agentic AI	15
Frameworks for responsible AI	17
The demand for AI talent	18
Momentum AI's key takeaways for leaders	19
Momentum in enterprise AI	20
What's next at Reuters Momentum AI	21
Sponsors	22

FOREWORD

Reflecting on the transformative discussions at Momentum AI New York 2025, I am proud to recount the energy and insights shared across sectors as we all showcased how AI is redefining productivity, collaboration and the creation of real value at our firms.

During the event, we explored how AI is transitioning from an efficiency tool to a proactive, automated decision maker. This marks a new era where AI is not just assisting users but augmenting and empowering them. AI agents truly have the potential to elevate human capabilities.

As we all recognized, there are many important strategic decisions to be made in this rapidly iterating era of AI agents. Together we can lead our respective industries in defining standards for how agents interact in a positive, governed, secure and well-defined manner.

In closing, thank you for contributing to this valuable event. As I stated in my remarks that day, I am more optimistic than ever that true automation is within reach and that there will be significant benefits for our firms, clients and employees.

Best regards,



Kate Stepp
Chief Technology Officer
FactSet



TIME FOR #REALTALK IN ARTIFICIAL INTELLIGENCE

Goldman Sachs had a pretty good business case for using AI even before so-called agentic models came along at the end of 2024.

The investment bank figured it could use AI assistants or 'copilots' to carry out simple tasks that could help its software developers save between 20% and 30% of the time it took to complete their work.

"That's actually quite amazing," said Marco Argenti, Goldman Sachs' Chief Information Officer, at Reuters Events' Momentum AI New York 2025 conference. "We have over 12,000 developers."

But then agentic AI emerged, delivering models that can solve multi-step problems without the need for human guidance. With agentic models, "It's no longer about gaining efficiency," Argenti said.

"It's multiplying your time, because it can do things for you. You can delegate tasks, so you could potentially have a fleet of virtual developers, virtual employees."

//
We're no longer talking about data and technology. We're talking about industry change; we're talking about the strategic direction of firms.

DARREN PERRY

Managing Director and Partner
L.E.K. Consulting

TANGIBLE IMPACTS

The experience at Goldman Sachs illustrates how AI is continuing to evolve a pace—but is also having tangible impacts on business strategy and operations.

"There is few other topics that are dominating the discussion in boardrooms and among C-suite leaders as AI is," said Darren Perry, Managing Director and Partner at L.E.K. Consulting, in Momentum AI.

"And for good reason. We feel any effective board or any effective leadership team should be embedding AI in its broader strategic thinking as they think of how they are going to create value."

Sydney Klein, Senior Vice President, Chief Information Security Officer and Head of IT Core Services at global pharmaceutical company Bristol Myers Squibb, said AI was now key to business strategy.

"This is something that is growing at unprecedented rates and many board members are curious about it but don't know where to go to get educated," she said at Momentum AI.

Because of this, she said, education—including through events such as Momentum AI—is "so incredibly important right now."



THE CHALLENGE OF AI ADOPTION

The emerging and fast-changing nature of AI makes it hard for business leaders to know when and where to make winning bets on the technology.

"It's early days, and for any revolution early days have great highs and great lows," said Jeffrey Katzenberg, Managing Founder of the technology investment firm WndrCo.

"Are things super frothy in the moment? Sure, they are. But I think this is the most important technological innovation in our lifetime. Sitting on the sideline and waiting is going to be a missed opportunity."

However, most companies, Perry at L.E.K. Consulting said, are still—like Goldman Sachs originally—focusing on AI as a way of improving efficiency.

"We think there's potential for those benefits to be eroded away in efficient, competitive markets," Perry cautioned. "You won't see the lasting value from those types of investments."

Instead, he said, companies should focus more on AI investments that drive competitiveness and create new revenue streams.

"We're probably missing the point about where the focus should be," said Daniel Barchi, Chief Information Officer at the \$38 billion nonprofit CommonSpirit Health, which operates 150 hospitals in 24 U.S. states.

"People are still looking for the killer app in AI and they don't recognize just the readiness of industries to adopt AI," he said.

CommonSpirit is already using up to around 160 AI applications. "Many of them are this mismatch between advanced technology and what's happening today," Barchi said.

One example of this mismatch is where AI models are used to critique and improve healthcare call center agent work. "Why don't we just go to agentic AI and replace the call center agents right now?" he said.

"There are health systems that are using AI to sort faxes properly. Think about that. We're still missing opportunities by not adopting what's out there."



If it's external facing, it has to be 100% right. I've seen that over and over. And security is always a big topic.

PATRICK ORENDORFF

Strategic Account Executive for financial services, Elastic



SUCCESS STORIES

Nevertheless, a growing number of industry success stories is helping to show how AI can be used strategically to deliver tangible return on investment (ROI).

One example is Destination Canada, Canada's national tourism organization, which created a self-sustaining AI system within 18 months on a limited budget.

"In Canada, tourism is a massive economic engine," said Meaghan Ferrigno, Destination Canada's Senior Vice President, Chief Financial Officer and Chief Data and Analytics Officer.

"It drives revenue to every corner of the country. But when the pandemic hit, it stopped. The borders closed. It revealed that we didn't have a central intelligence so we could respond."

Destination Canada decided not only to create a database for the industry, but also what Ferrigno calls "a central brain for the tourism sector. We brought rich demand- and supply-side data together."

The body now pulls 25 billion rows of trusted data from more than 205 sources and delivers intelligence to more than 200,000 businesses and 5,000 communities.

AI "wasn't bolted on around the edges," said Ferrigno. "It was built into the core of what we did. And it's not just for efficiency. We did it so that we could change the game."

Destination Canada's platform uses the technology to help tourism companies make more money, for instance by delivering a 40% improvement in the media efficiency of marketing campaigns.

40%

Improvement in the efficiency of tourism marketing campaigns by using AI at Destination Canada



FINANCIAL SERVICES FIRMS SHOW THE WAY

One sector where many companies are moving rapidly to embrace AI in a strategic way is financial services.

Banks and investment houses have a long tradition of adopting new technologies and now see AI as a major lever for competitive advantage.

“This is probably the most active year in the time that we’ve been tracking AI adoption in the banks,” said Alexandra Mousavizadeh, CEO of Evident Insights, which produces an industry index.

Covering the 50 largest banks in Europe and North America, and last updated in October 2024, the index covers areas from talent to innovation and research and public disclosures regarding investment.

Evident Insights also researches ROI figures for AI use cases, although these are not published externally.

North American banks lead AI adoption

Top 10 banks in the 2024 Evident AI Index

North American banks, led by JP Morgan and Capital One, dominated the latest ranking, Mousavizadeh said. Likely this is because in the U.S. “there is a mindset, there is a proximity to tech,” she said.

“There is also a common aspect, which is [North American entities] started a lot earlier than many of the European banks did.”

Starting early is important, since the gap between leading and lagging banks is increasing over time. “The top 10 banks are growing at a double pace of all of the other banks,” said Mousavizadeh.



BANK	REGION	2024 RANK	2023-24 RANK CHANGE	TALENT RANK	INNOVATION RANK	LEADERSHIP RANK	TRANSPARENCY RANK
JPMorganChase	USA	1	-	2	1	3	1
Capital One	USA	2	-	1	3	14	14
Royal Bank of Canada	Canada	3	-	6	2	8	10
Wells Fargo	USA	4	-	4	5	36	8
CommBank	APAC	5	↑1	7	12	2	5
UBS	Europe	6	↓1	3	18	15	15
HSBC	UK	7	↑6	15	9	5	3
Citigroup	USA	8	↑1	5	7	13	43
TD Bank	Canada	9	↑2	10	8	20	16
Morgan Stanley	USA	10	↑7	18	4	17	42

Source: Evident Insights, April 2025.

HOW FINANCIAL SERVICES IS USING AI TECHNOLOGY

Compared to earlier artificial intelligence and machine learning models, generative AI “is a different beast,” said Mousavizadeh of Evident Insights.

“Everyone is thinking about how to operationalize that and implement that at scale.”

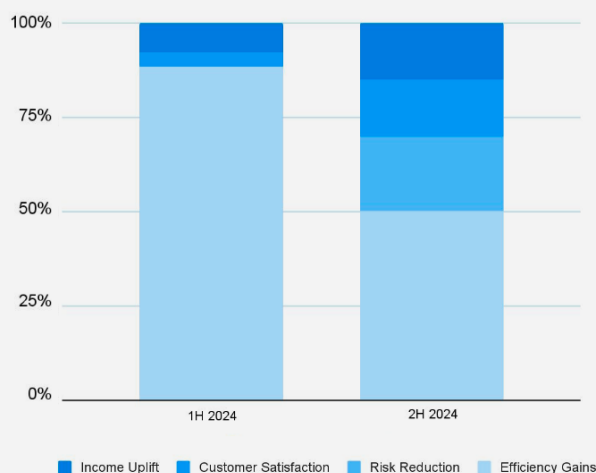
At BNY, which has \$53 trillion in assets, AI is being used for staff, for instance in the form of virtual assistants, and for clients, with more than 50 models in production.

These cover applications as diverse as trade analytics, liquidity management forecasting and client lead recommendation.

“We’re seeing really great results,” said Leigh-Ann Russell, Chief Information Officer. “We’ve seen faster processing times, lower costs and higher profitability from our AI efforts so far.”

Banking AI is spreading beyond efficiency gains

Breakdown of publicly disclosed banking use cases, by type of ROI



Source: Evident Insights, April 2025.



A lot of it comes down to where are the opportunities where GenAI can add unique value.

GREG ULRICH

Chief Technology and Information Officer, Mastercard

Aditya Bhasin, Chief Technology and Information Officer at Bank of America, said it is important to understand what processes are best suited to AI.

“Which of those processes are great for being automated through artificial intelligence with capabilities that aren’t there in deterministic automation?” he asked.

“Then you start asking: where are the biggest client problems? If you understand processes, the activities and the costs associated with them, then you aren’t having a big ROI discussion after the fact.”



79%

Generative AI use cases that are internal facing and low risk, according to Evident Insights research

INSURANCE USE CASES

One area with clear potential for ROI is insurance.

"This is an industry that has an abundance of unstructured data," said Peter Hahn, Chief Technology Data and Analytics Officer at the commercial insurance company Vantage Risk.

"That has been one of the perennial challenges for the industry."

Vantage started using generative AI at the end of 2022, initially focusing on user adoption and business value. "We got started on solutions that delivered personal productivity," said Hahn.

The company deployed an in-house AI model called VantageGPT and asked staff to use it for self-evaluation. "That was a way to break the ice, so to speak, with our staff," Hahn said.

"When I was reading the self-evaluation summaries from team members that year, it was the most amazing team that I'd had."

Now, however, Vantage is embedding generative AIs and large language models (LLMs) inside workflows and business tools, essentially making them part of the fabric of the business.

"All [end users] should see and all they should feel is that the tools and processes have just gotten that much smarter, that much faster and that much easier," said Hahn.

One example is in pricing cyber insurance, where underwriters can get help from AI in extracting risk scores from non-machine-readable documentation. This application was released in early 2025.

"The machine got to a point where it was answering more than 80% of 45 questions on a consistent basis, and for the questions it was answering the accuracy was well over 90%," Hahn said.



ELEVATING HUMAN CAPABILITIES WITH AGENTS

The paradigm of humans adapting to computers' language has now flipped to computers understanding human language and intent, said FactSet Chief Technology Officer Kate Stepp. That development and the growth of AI agents have made her more optimistic than ever that true automation is within reach for the financial sector.

"Agents have executed tasks at a speed and scale that was previously thought to be unimaginable," she said. "For example, pinpointing opportunities in global markets, completing thousands of compliance checks and delivering a complete risk assessment of a novel investment area. With agents, AI becomes not just an efficiency tool but also an elevation of human capabilities."

INCREASING CAPABILITIES

Advanced AI can take on a growing range of capabilities that previously required a lot of human brainpower and time. For example, financial research requires you to think about the right system or applications to use. You then open them, navigate and click through complex interfaces, and you read and process volumes of content.

"With agents, the AI is translating the tools at your disposal with API calls to the right systems to do the right visualizations, and to read and synthesize across news, competitor activities and historical and real-time market data to conduct your research and even take actions on your behalf," Stepp said. "We're going beyond just assisting the user and waiting for instructions from the user. Agents perceive their environment and proactively act based on a goal. That's where we can really deliver more value and discover more value."

IMPORTANCE OF HIGH-QUALITY DATA

Today, with GenAI tools, if data is wrong you might get an incorrect insight. But in the future, with AI agents, wrong data leads to wrong actions at a huge scale.

"Firms need to be at a place where the data is really in a state that brings confidence to the agentic AI process," Stepp said. "Ruthlessly addressing and improving any data quality issues, taking the time to do that, investing in systems that make the data programmatically available to AI systems at scale, and then also having ways to really automate back to the source will be important in this whole process."

PREPARING FOR AGENTS

In addition to treating data as critical infrastructure in preparation for agents, it's important for organizations to use AI tools as much as possible.

"You will learn the vital skills of effective prompting, evaluation of output and seamless integration of your workflows," Stepp said. "Notably, you'll also gain insight into how it works and where the limits are. And with each interaction you are teaching the underlying models the nuances of your business and data. All of that is important for building AI systems in-house and with trusted partners."



With agents, AI becomes not just an efficiency tool but also an elevation of human capabilities

KATE STEPP

Chief Technology Officer
FactSet



THINGS TO CONSIDER IN DEPLOYING AI MODELS

Despite its importance, navigating the landscape of AI deployment presents a significant challenge today not only for financial services companies but also for those in other sectors.

One basic question is whether an organization should build its own AI in house, work with a third-party developer or buy an existing model.

These options are not mutually exclusive, with some players—including Evident AI index leader JP Morgan, financial services tech specialist Block and insurer New York Life—buying and building AIs.

“The common thread is making sure you’ve got the right access to data, unstructured as well as structured,” said Alex Cook, Senior Vice President and Head of Strategic Capabilities at New York Life.

“We’ve got lots of implementations of more traditional AI where we’re really looking at decisioning and we need to understand how the models are working.”

As well as building or buying models, there is a growing trend to empower users with off-the-shelf platforms such as Microsoft Copilot and ChatGPT Enterprise, he said.

TECHNOLOGICAL DISRUPTION

Another challenge for organizations implementing AI is how to prepare the enterprise for the next wave of technological disruption.

“It’s how we change the experience in a way that makes this work smarter, better, faster,” said Desiree Gosby, Senior Vice President of Tech Strategy Operations and Emerging Technology at Walmart.





Prioritizing is important. The first thing to do is start with your business strategy. That is your map for what you should work on. We're looking to deliver more medicines to more patients, faster."

SYDNEY KLEIN

Senior Vice President, Chief Information Security Officer and Head of IT Core Services, Bristol Myers Squibb

Walmart has used AI to help its merchants save thousands of hours a year, by having better access to data, and see which products are affected by consumer trends, for use in new product development.

Accessing such benefits is not without challenges, however, including a need to balance deployment speed with governance.

"There's a race for rapid adoption," said Alex Baldenko, Head of Data Science at insurer MassMutual. "At the same time, there's a need for responsible adoption. Concerns about risk and bias are real."

Much of the current discussion of AI is around democratizing the technology, "which is certainly a noble purpose," he said.

"There's a theory there that by putting the tools in everyone's hands, ideas will be created that will lead to value creation.

"Another, complementary approach is starting with bold and specific business transformation objectives, looking at a very short list of the most impactful hypotheses and focusing on those."

An interdisciplinary enterprise team with top-down support may find it much easier to achieve results using the second approach, Baldenko said.



17%

Year-on-year growth in financial services AI and data talent pools, based on Evident Insights data

THE KEY ROLE OF DATA IN DELIVERING AI SUCCESS

One of the most often-cited considerations relating to AI deployment is data.

It is vital for the training and development of AI, but the quality of the unstructured data now being used with GenAI is potentially an issue, said Jodie Wallis, Chief Analytics Officer at the insurer Manulife.

"We've developed some great programs for managing the quality of structured data," she said. "We think our data governance and tooling are pretty good. But unstructured data is a whole new can of worms."

AI data can also be a source of risk, with models potentially leaking intellectual property and AI-enabled cyberattacks increasing the threat of breaches and privacy violations.

In this respect, said Andrea Abell, Chief Information Security Officer at Eli Lilly, "One approach we're starting to get into is pen testing for AI models, to say: does this model react the way you think it's going to?"

A further complication of AI is that there is little transparency regarding the data inputs and outputs of many models.

"One of the things that is a risk for us is explainability of these models," said Kathy Kay, Executive Vice President and Chief Information Officer at Iowa-based Principal Financial Group.

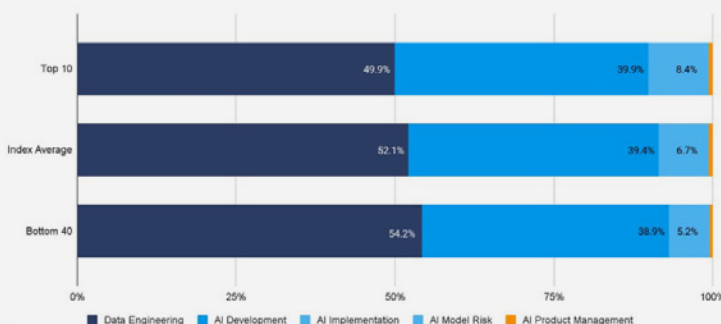
"How do we really know what they're doing, how they're coming up with their answers, how do we trace back to data that might have been used? It's a risk that we are very focused on."

An overconfidence in the results of AI could damage trust in the technology, said Jo Ann Davaris, Chief Privacy Officer at Booking Holdings, which owns Booking.com.

"Can you validate how it produces its output is very important to me," she said.

AI laggards spend more on data engineering

AI talent volume of Evident Index banks, by capability area



Data challenges can have an impact on resourcing, creating a need for specialists who are in short supply.

"What we're finding is data engineering and data flow is in many cases harder and more important than the AI," said Matt Studney, Vice President of IT at Merck Research Laboratories.

"You can enable workflows to be more efficient, but we also need our people to stop thinking 'Today I do A, then B, then C, then E, then F.' You should be going straight from A to F."



While data is a key consideration for AI deployments, it can also be an area where technologies such as GenAI can deliver improvements.

AI models can help make sense of unstructured data formats, for example, or search databases for specific information.

“We have these massively large, complex ecosystems with data integrations and platforms that we don’t even fully understand sometimes, because there’s so many connections,” said Studney.

With AI, he said, “We’ll be able to upgrade and modernize faster, develop faster, build bespoke applications faster, test faster, and build better experiences for our scientists and colleagues.”



People really need to dive into what kind of impact across teams, what kind of human impact it has.

RYAN PATEL

Senior Fellow and Global Business Executive Board Director, Drucker School of Management



THE GROWING TREND TOWARDS AGENTIC AI

While basic AI models have been used widely for the best part of a decade, recent months have seen an explosion of interest in agentic systems that can carry out tasks autonomously.

The pace of agentic model adoption is picking up, with Mastercard announcing a product called Mastercard Agent Pay during the Momentum AI event.

Mastercard claims the agent, which integrates payment capabilities into AI conversations, will deliver smarter, more secure and more personal payments experiences to consumers, merchants and issuers.

"As agentic AI is taking force, it's coming into commerce," said Greg Ulrich, Mastercard's Chief AI and Data Officer. "I'm going to research, going to search, going to get recommendations for an item."

"I want to then execute the transaction within that ecosystem. That's going to become more and more a part of how we shop. What we're announcing enables us to take the first steps in this ecosystem."

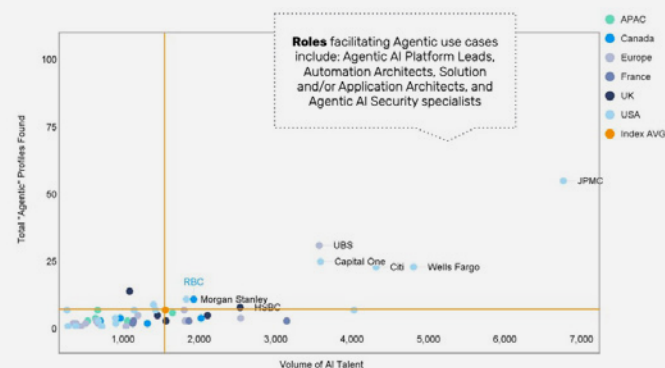
AI agents are expected to underpin a new wave of innovation in financial services, with several U.S. banks already trialing the technology.

"This is the new topic in everybody's mind," said John Almasan, Senior Managing Director and Head of AI and Emerging Tech at Teachers Insurance and Annuity Association of America (TIAA).

"An agent is an intelligent solution that is capable to mimic our day-to-day tasks. These agents are our co-workers, our associates, to support us in our journey to become more efficient, smarter, better."

U.S. banks lead in agentic AI expert hiring

Volume of total AI talent versus agentic roles



Source: Evident Insights, April 2025.





Our customers are looking for this very scalable, human-like agent who can help their customers shop.

VIKAS JHA

Head of AI Innovation
Bloomreach

It is not just the financial services sector that is adopting agentic AI, however.

Pringles maker Kellanova is also experimenting with the technology, for example, while NRG Energy is already orchestrating models.

"We're definitely in a hype cycle like we've never seen before, that is being accelerated by social media," said Cristina Manchini, CEO at nonprofit organization Black Girls Code.

"Everybody feels they are missing out already, so there is this big rush to be the first one to get to market with the best product."

Under the circumstances, she said, there is a danger that agentic AI development could lead to negative outcomes if pursued without appropriate guardrails.

"We are far from not needing to have human oversight," she said. "You'll start to see, as more bad technology pushes out, more people being disenfranchised by the technology, which is unfortunate."

However, said Kim Hales, Chief Data and AI Officer at NRG Energy: "While there is a lot of hype out there, the results are very real. What we value the most is the operational metrics."

NRG Energy has seen up to a doubling in the rate of customer satisfaction thanks to the use of agents, he said. "We continue to watch this exponential growth of the technology," he said.

FRAMEWORKS FOR RESPONSIBLE AI

With GenAI and agentic AI set to transform highly professionalized sectors such as finance and professional services, there is a major need to ensure the models deployed can be used responsibly.

Manchini, of Black Girls Code, raised concerns over the potential for biased results coming from training sets that might fail to address social diversity, for example.

While such biases already exist in many sectors of society, there is a danger of them being more hidden from view as human interactions become increasingly mediated through AI agents.

Already, sectors with a major impact on peoples' lives, from banking and insurance to legal and accounting, are investing heavily in AI technology.

Reuters Events' owner Thomson Reuters, for example, has spent around \$2.5 billion on AI and automation in the last two years, according to Steve Hasker, President and CEO.

"We're spending \$200 million a year in cash on injecting generative AI into our flagship products, like Westlaw, UltraTax, CoCounsel," he said. "Talent is our constraint, not our balance sheet."

For professional services, generative AI could be as transformative as the advent of the internet or the emergence of the Big Four accounting firms, he said.

SUPPORTING INNOVATION

While companies and industries will need to ensure their models are developed responsibly, government regulations will also play a part.

In the U.S., the focus has been on allowing AI to enable innovation, said Kathi Vidal, former Under Secretary of Commerce and Director of America's Innovation Agency.

"We need to come up with policy that allows and encourages people to use AI as part of the inventive process, and allows them to protect that," she said.

Vidal backed U.S. regulations that allow AI-based innovation to be patented, provided there is a human contribution. "It gives you enough to protect your innovations," she said.

"There's a lot of opportunity to shape policy now, and that's what I would like to see happen," she added.

Nevertheless, patent office resources are threatened by cuts under the Trump administration.

"The natural result of that is it will take you a lot longer to get a U.S. patent, which is a real problem, especially when it comes to AI, when you're moving at speed and scale," Vidal cautioned.

"It also means that as you start to make money, you'll likely get patent trolls coming after you. It's going to be much harder to challenge those patents—and much more expensive."

As in many other areas, however, AI may become part of the solution instead of being a problem, for example by improving the efficiency of patent office processes.

"What I would love in an ideal world is AI gets back to you quickly and says here are the issues we've found, so you can solve them," Vidal said.



We have a thousand AI use cases in production. Every use case, before it goes into production, has to clear the responsible AI review board. And then every use case in production, at scale, has to again go through a quarterly review of the same responsible AI principles.

SANDEEP DADLANI

Executive Vice President and Chief
Digital and Technology Officer,
UnitedHealth Group

THE DEMAND FOR AI TALENT

As AI transforms workflows it is also upending talent markets, according to Karin Kimbrough, Chief Economist at LinkedIn.

Technological change has always affected workplace roles, she said, with 20% of U.S. workers being employed last year with job titles that did not exist in 2000.

But the advent of AI is speeding up this trend, with the last year seeing a sixfold increase in job openings on LinkedIn that mentioned AI literacy.

"The number one job in the U.S., the UK, the Netherlands, is AI engineer," Kimbrough said. "AI is at the top of the list for 15 countries globally."

This is a remarkable shift considering that LinkedIn lists around 41,000 possible skills and AI was a specialist subject until a year or so ago.

Research by the social media platform suggests AI could accelerate the rate of skills rotation up to 175% compared to the previous quarter century.

"We think the core skills for any role will have changed by 70% by 2030," Kimbrough said.

"Employers are looking for AI literacy skills, which means that, whatever your job is, you are adept at using these tools, understanding the limits of the tools and have good judgement to pair with it."

With Kimbrough reporting 10% fewer jobs on LinkedIn than a year ago, the message for workers is clear: AI may not take your job, but you will need to know about the technology to stay employed.



\$4.1 Trillion

Productivity-related economic gains that could be unlocked by generative AI in the U.S., according to LinkedIn

MOMENTUM AI'S KEY TAKEAWAYS FOR LEADERS

Momentum AI was packed with important messages for business leaders, but here are four overriding takeouts from the event—plus one specifically for the financial services sector.

01 FOCUS ON STRATEGIC ALIGNMENT AND BUSINESS OBJECTIVES

Ensure AI initiatives are closely aligned with your organization's strategic goals. Regularly engage with the C-suite and board to maintain alignment and secure necessary resources.

"We're on track to shave three years off our drug development time," said Sydney Klein at Bristol Myers Squibb. "You can't get any closer to the strategy than that."

02 PRIORITIZE DATA READINESS AND GOVERNANCE

Invest in modernizing data infrastructure, ensuring data quality and establishing robust governance frameworks. Set up cross-functional teams to manage data and AI initiatives.

And, said Andrea Abell at Eli Lilly, "We're constantly trying to meet with vendors and saying: 'You can't forget about security.'"

03 IMPLEMENT GUARDRAILS FOR AUTONOMY

As AI systems gain more autonomy, establish robust guardrails to ensure they operate within safe and ethical boundaries. Regularly involve human oversight to validate AI outputs and maintain trust.

"There needs to be a human in the loop who at the very least is prepared to take responsibility for that output," said Steve Hasker at Thomson Reuters.

04 FOSTER HUMAN-AI COLLABORATION

To effectively integrate AI into your organization, focus on designing agents to complement human tasks, enhancing productivity and decision-making without replacing people's intuition and expertise.

"Even though they are very competitive because they never get tired, [agents] also need us to be there for them, to help them and to keep them also accountable," said John Almasan at TIAA.

05 EMBRACE REGULATORY AND COMPLIANCE INNOVATION

In financial services, navigating the complex regulatory landscape is crucial when implementing AI solutions. It's essential to proactively engage with regulators and develop innovative compliance strategies.

Plus, "It is important to maintain data isolation but give business the benefit of driving competitive advantage," said Ampily Vijay, CBRE Investment Management's Chief Digital and Technology Officer.



REFLECTING ON MOMENTUM AI NEW YORK 2025

Momentum AI New York 2025 wasn't just another conference—it was a convergence of minds, missions and momentum. What set this event apart was the strength of the community it brought together.

Attendees and speakers formed a diverse, engaged and forward-thinking group of leaders who are not only shaping the future of AI but also supporting one another in doing so.

Across two days, the event saw a rare blend of strategic insight, practical implementation and human connection.

From enterprise-scale deployments to deeply personal career journeys, the conversations were rich, real and resonant. Here is what some of the attendees had to say:

"A rare convergence of AI leadership, real-world case studies and strategic foresight... The conference also thoughtfully connected attendees and speakers seamlessly with content that went beyond implementation guidance."

Nina Edwards, Vice President of Emerging Technology and Innovation, Prudential Financial

"Reuters always convenes some of the best conferences... I've already learned a lot from the sessions I've attended."
Sandeed Dadlani, Executive Vice President and Chief Digital and Technology Officer, UnitedHealth Group

"Excellent breadth and depth of experience. Fresh content. Pragmatic and forward-looking at the same time. Terrific size—so you can actually collaborate and network."
Angelique Mohring, CEO, GainX

"Momentum AI is truly a special forum for conversations around what's working in AI deployments within enterprise. Grateful to be part of it."
Justin Wexler, General Partner, WndrCo

"Great opportunity to hear and learn a range of perspectives, developments in AI. Good opportunity to grow network." Julia Gosset, Vice President of Identity Solutions Product, Mastercard

"An opportunity to learn from industry leaders, particularly on impactful strategies regarding AI and implementation."
Amelia Persaud, Technology and Supply Chain Counsel, Foot Locker

Looking ahead, it is clear the value of this community lies not just in the insights shared—but in the relationships built and the collective ambition to drive meaningful, responsible innovation.



[Momentum AI] is full of the top CIOs and enterprise leaders, who lead the charge on enterprise AI adoption. That's helpful for me—to get their perspective, but also hopefully helpful for me to work with them to implement some of our AI portfolio.

GRACE ISFORD

Partner, Lux Capital

What's next at Reuters Momentum AI:

Momentum AI San Jose 2025 | July 15-16

Momentum AI London | September 29th-30th

Momentum AI Asia | September 17th

Momentum AI Finance NYC 2025 | November 17-18

Momentum AI New York 2026

FIND OUT MORE ABOUT OUR EVENTS



Thank you to our Sponsors!

GOLD SPONSORS



SILVER SPONSORS



BRONZE SPONSORS

