

PRESS RELEASE

CFA Institute Equips the Investment Sector to Navigate AI Developments

New report presents practical examples of how to responsibly adopt AI

[SYDNEY AUSTRALIA] – February 5 2026 – Responding to the rapid uptake of artificial intelligence (AI) in investment management, the CFA Institute has released a new global publication, [AI in Asset Management: Tools, Applications, and Frontiers](#), targeted at helping investment professionals better adopt and adapt AI to inform and guide investment decision-making.

The full volume from the CFA Institute Research Foundation and CFA Institute Research and Policy Centre comprises 10 chapters that bring together core disciplines, including machine and deep learning, natural language processing, network theory and quantum computing, to demonstrate how AI is being put to work in real investment contexts.

Mona Naqvi, Managing Director, Research, Advocacy, and Standards at CFA Institute, said: “We seek to equip investment professionals with the knowledge and ethical frameworks needed to integrate AI responsibly. CFA Institute has long helped the profession recalibrate through change, ensuring that new technologies are applied based on ethical frameworks and human judgment. The examples in this publication invite practitioners to think critically and experiment with AI tools, while keeping ethics and investor trust at the core,” she said.

CFA Society Australia CEO Lisa Carroll said Australian asset managers are increasingly using AI to guide investment decision-making. “Built for portfolio managers, analysts, CIOs, and risk leaders, the publication will help Australian investment professionals identify where AI can add measurable value. The publication explores various methods of using AI, tools, and case studies, designed to help practitioners put AI to work immediately,” Carroll said.

“For example, as investment firms rapidly scale machine learning (ML), commodities remain one of the last areas where ML has [not yet been broadly applied](#). While ML has transformed equity investing, powering advances in factor discovery, portfolio construction, and systematic strategies, commodities have not kept pace. Yet a huge amount of capital has flowed to commodity markets, including gold, silver and copper, in 2025 and 2026, for example, as global economic uncertainty, energy crises and supply chain disruptions have put commodities at the centre of global trading.

“Another critical chapter examines the ethical use of AI; it is critical for investment managers to sustain trust, ensuring long-term resilience and meeting fiduciary obligations while using AI. For risk and compliance professionals, the chapter on ethical use of AI provides guidance on ensuring that AI systems are transparent, fair, and compliant with evolving ethical and regulatory standards. For investment managers, this chapter highlights how AI can be responsibly integrated into

trading, portfolio management, and credit analysis while maintaining fiduciary duty and client trust,” Carroll said.

More broadly, the publication helps investment practitioners:

- Identify where AI adds demonstrable value beyond traditional quantitative methods.
- Integrate machine-learning pipelines into existing investment processes.
- Balance automation with human oversight, while maintaining governance and accountability.
- Evaluate and manage new sources of risk introduced by complex algorithms built into investment models.
- Use deep-learning approaches for trading and risk management, enabling more adaptive and data-driven decision processes.

Leading experts who contributed to *AI in Asset Management: Tools, Applications, and Frontiers* include: Paul Bilokon, PhD; Francesco A. Fabozzi, PhD; Maxim Golts, PhD; Tony Guida; Igor Halperin, PhD; Petter N. Kolm, PhD; Gueorgui S. Konstantinov, PhD; Anna Martirosyan; Gordon Ritter, PhD; Agathe Sadeghi, PhD; Joseph Simonian, PhD; Alireza Yazdani, PhD; and Oswaldo Zapata, PhD.

AI in Asset Management builds on prior research from CFA Institute, including research addressing Ethics and AI, AI washing, AI and pensions, Explainable AI, and Synthetic Data in finance. This research is published on the [CFA Institute Research and Policy Centre](#).

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About CFA Institute

As the global association of investment professionals, CFA Institute sets the standard for professional excellence and credentials. We champion ethical behavior in investment markets and serve as the leading source of learning and research for the investment industry. We believe in fostering an environment where investors' interests come first, markets function at their best, and economies grow. With more than 200,000 charterholders worldwide across 160 markets, CFA Institute has 9 offices and 158 local societies. Find us at www.cfainstitute.org or follow us on [LinkedIn](#).

About CFA Society Australia

CFA Society Australia is part of the worldwide network of CFA Institute member societies that lead the investment profession globally by promoting the highest standards of ethics, education and professional excellence for the ultimate benefit of society. CFA Society Australia represents the interests of over 3500 investment professionals through advocacy, education, events, and professional development. For more information visit www.cfas.org.au, or follow us on [LinkedIn](#).