



FOR IMMEDIATE RELEASE

OPCO ADVISORY INTRODUCES *FINOPTIQ* AND APPOINTS CAPITAL MARKETS RESEARCH VETERAN ROBERT IATI AS SENIOR ADVISOR

AI-POWERED RESEARCH PLATFORM, PURPOSE-BUILT FOR THE CAPITAL MARKETS ECOSYSTEM, INTRODUCED UNDER THE GUIDANCE OF A FOUNDING VOICE IN FINANCIAL SERVICES RESEARCH

NEW YORK, NY — [May 11, 2026] — OPCO Advisory, an execution-focused advisory firm serving the Capital Markets ecosystem, introduced *FinoptiQ*, a proprietary AI-powered research capability built to deliver institutional-grade intelligence on the global Fintech landscape. Alongside the introduction of *FinoptiQ*, OPCO announced the appointment of **Robert Iati** — co-founder of TABB Group, former CEO of Burton Taylor, and one of the most recognized names in capital markets research — as Senior Advisor, where he will lead *FinoptiQ*'s research development, curation, and strategy.

FinoptiQ is designed to serve the specific intelligence needs of private equity firms, corporate development teams, and Fintech organizations operating in and around capital markets. Drawing on OPCO's proprietary taxonomy — built over years of active engagement across the Capital Markets ecosystem — *FinoptiQ* applies AI to a thoughtfully architected knowledge base that reflects the industry's actual structure: its workflows, participants, technology layers, and evolving dynamics. The result is research that is not only faster to produce but also more structurally coherent and contextually richer than conventional approaches can deliver.

The appointment of Robert Iati brings a dimension of credibility that is rare in the AI research space. Iati spent the early part of his career inside global investment banks — Lehman Brothers and Deutsche Bank — building and managing the trading technology and operations systems that kept markets functioning. He later became one of the industry's foremost research strategists, co-founding TABB Group, which set the standard for independent capital markets research for over a decade. He has also led research and strategy practices at Burton Taylor International Consulting and TowerGroup and held senior roles at Dun & Bradstreet.

"We have known Bob since his time at the TABB Group and are excited to have him be part of our team as we introduce *FinoptiQ* to our clients," said Rishi Nangalia, Managing Partner at OPCO Advisory Inc.

"I've spent my career watching how research gets made — and more importantly, how it gets used," said Robert Iati, Senior Advisor at OPCO Advisory Inc. "For a long time, the best research in this industry came entirely from the minds of the analysts living inside the markets they were covering. That intimacy with the subject matter was its greatest strength

— and its greatest constraint. What OPCO has built with *FinoptiQ* is genuinely compelling: a platform where AI does the heavy lifting in data assembly and pattern recognition while operating within a taxonomy that reflects real market intelligence. The structure is what matters. And OPCO's structure is right."

FinoptiQ's research capabilities are directly integrated into OPCO's core advisory offerings, providing clients with on-demand, high-context intelligence to support due diligence, competitive landscaping, investment thesis development, and market entry analysis. For private equity and corporate development clients in particular, *FinoptiQ* represents a meaningful upgrade to the research infrastructure that typically underpins high-stakes capital markets decisions.

The introduction of *FinoptiQ* reflects OPCO's continued investment in proprietary capabilities that extend its value beyond traditional advisory — combining operational expertise, industry reach, and now a research platform purpose-built for the professionals who need to understand capital markets Fintech most clearly.

ABOUT FINOPTIQ

FinoptiQ is OPCO Advisory's proprietary AI-powered research platform, purpose-built for the Capital Markets ecosystem. Grounded in a rigorously maintained Fintech taxonomy developed through years of direct industry engagement, *FinoptiQ* delivers structured, high-context intelligence for private equity, corporate development, and Fintech clients navigating the capital markets landscape. *FinoptiQ* is available as part of OPCO's integrated advisory engagements.

ABOUT OPCO ADVISORY

OPCO Advisory is an execution-focused advisory firm serving the Capital Markets ecosystem — including buy-side and sell-side institutions, Fintech firms, banks, and financial and strategic investors. Led by a team of experienced operators, entrepreneurs, and advisors, OPCO provides Advisory and Strategic Capital services designed to help clients grow, scale, and transform. OPCO's guiding principles are partnership, transparency, and the delivery of client outcomes.

For more information, visit opcoadvisory.com.

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