

dakota marketplace

Dakota Marketplace Product Roadmap Webinar

September 16th, 2026

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WHAT'S INCLUDED

- Opening Remarks from Gui Costin
- AI Capabilities, Connectors & MCP
- International Data Expansion
- Conference Speaker Data
- Family Office Data Milestone
- Career History & Company Alumni Network
- Dakota Private Markets (New Product)
- 13F Data Enhancements
- Dakota Marketplace for Salesforce (v4.0)
- News, Newsletters & Data API
- Events & Community Building
- What's Coming Next

EPISODE OVERVIEW

Dakota hosted its Q3 2026 Product Roadmap Webinar to outline platform updates, new data initiatives, and product launches heading into the fall. Founder & CEO Gui Costin opened with remarks on Dakota's overall data growth, and the session went on to cover expanded AI connector adoption, new international and family office data, a new standalone product launch in Dakota Private Markets, 13F and Salesforce app enhancements, and an active fall events calendar.

OPENING REMARKS FROM GUI COSTIN

- Dakota has 10x'd its fundraiser-focused data over the past two years and now offers a global, all-channel LP database — the only one at this depth in the market
- Coverage spans RIAs, family offices, sovereign wealth funds, public pension funds, foundations and endowments, insurance company general accounts, 350,000+ financial advisors, and 23,000+ financial advisor teams across every major jurisdiction (Singapore, UK, Latin America, the Nordics, US, Canada, Mexico, and more)
- Now includes 13F data, Form D (new companies, first close, and final close), and Form ADV detail, plus 60,000+ public pension fund holdings and 30,000+ manager decks
- GP-side data has also expanded: 23,000+ GPs, 60,000+ funds, and performance information on 18,750+ funds, supported by new benchmarking technology
- 30,000+ private company transactions in the database, growing by roughly 2,000 per month
- Dakota Marketplace remains the dedicated, custom-UI product built for fundraisers; a new standalone product, Dakota Private Markets, has launched for allocators who only need private markets fund performance data, priced at \$9,500 for 5 users

To explore more about Dakota Marketplace, [book a demo here!](#)

AI CAPABILITIES, CONNECTORS & MCP

- MCP-based connectors now include a live Copilot beta in addition to Claude and ChatGPT; early feedback has been strong — Microsoft-shop customers should reach out to their CSM to get set up
- 35% of customers are now using the AI connectors, with positive feedback coming through Slack, particularly from users who are on the road or don't have constant platform access
- Dakota is in active conversations with other vertical AI tools for the investment industry, including Metal AI, Hebbia, and Blue Flame, and welcomes customer requests for additional integrations

To get set up with our Chat GPT or Claude connectors, [book a demo here!](#)

INTERNATIONAL DATA EXPANSION

- New UK charities data set in development, led by James, Kizar and the data team, prompted by client feedback that an existing charities data provider had gone stale after being acquired
- Roughly 2,000 charities identified so far, along with thousands of associated trustees and accurate contact information; some records are already visible under Foundations in London within Dakota Marketplace
- Full rollout expected by the end of September

To see more of our international data, [book a demo here!](#)

CONFERENCE SPEAKER DATA

- New conference speakers data set launched in response to customer feedback that speaker lineups matter more than conference topic alone
- 2,000+ conference speakers collected and now filterable within the Conferences tab, supporting workflows like identifying which RIA CIOs are speaking at conferences in specific cities

To see our conference data, [book a demo of Dakota Marketplace!](#)

FAMILY OFFICE DATA MILESTONE

- Dakota has surpassed 5,000 family offices globally, reflecting continued international build-out
- Data quality remains a priority, with a focus on family offices that are active allocators rather than self-proclaimed family offices

Book a demo to see our family office data in Dakota Marketplace.

CAREER HISTORY & COMPANY ALUMNI NETWORK

- New career history feature now live on contact records, showing where a contact previously worked
- Enables an “alumni network” view — for example, seeing everyone who worked at a given firm (e.g., Cambridge Associates) during a specific date range, filterable by past and current role and start/end dates

To explore more, book a demo of Dakota Marketplace.

DAKOTA PRIVATE MARKETS (NEW STANDALONE PRODUCT)

- New standalone product for the investment allocator audience, presented by Alex deMarco of Dakota’s research team, built to reduce time spent gathering fund research from disparate sources
- Fund performance across 18,000+ funds and all major asset classes, with IRR, TVPI, and DPI metrics
- Manager and sponsor intelligence, covering investment approach, team, portfolio companies, deal activity, consultant reviews, and investment presentations
- Custom benchmarking, including peer groups built by strategy, vintage, geography, and fund size, plus standardized asset class benchmarks updated quarterly

To see Dakota Private Markets, request access here.

13F DATA ENHANCEMENTS

- Continued build-out of 13F data, now including advanced, firm-level aggregated fields beyond individual fund flows
- New capabilities include total AUM in ETFs, percentage of AUM in ETFs, quarter-over-quarter changes in exposure, and identifying which firms are increasing, decreasing, or fully exiting a position
- Customer success managers are trained on the new fields and available to walk through use cases

Book a demo for a deeper dive into Dakota Marketplace's 13F fields.

DAKOTA MARKETPLACE FOR SALESFORCE (V4.0)

- Latest version of the Salesforce AppExchange-approved integration, presented by Dominique Mortelli
- Dakota Accounts and Dakota Contacts are now separate tabs, allowing users to save, create, and export custom list views
- Contacts can now be created or linked directly from the account record page
- Accounts and contacts can now be linked simultaneously in a single step, replacing the previous two-step process

To see how our Marketplace for Salesforce works, [book a demo here!](#)

NEWS, NEWSLETTERS & DATA API

- Dakota's news database has grown to 25,000+ proprietary stories, with AI connectors allowing clients to pair their preferred LLM with the news database for fundraising, allocator, and manager research workflows
- A news API is now available, feeding Dakota's reporting directly into clients' internal systems
- Newsletter portfolio has expanded with more targeted titles covering areas like family office investments, GP stakes, and private fund intelligence for allocators, with additional titles planned in the coming months

Newsworthy tips or questions for the news team can be sent to news@dakota.com

EVENTS & COMMUNITY BUILDING

Dakota Cocktails

- Boston — September 23, Boston Harbor Hotel
- Chicago — September 28, Chicago Firehouse
- London — October 14, Ham Yard

All Dakota Cocktails events are free, with no presentations or pitches — just networking.
Register at dakota.com.

London Fundraising Lunches

- October 12 — Ham Yard (capped at 12 attendees)
- October 13 — Sexy Fish (capped at 12 attendees)

Reach out directly to request an invitation.

Dakota Data Summit

- October 5, 2026, 11:30 AM – 5:00 PM
- Dakota's Philadelphia office
- 12 speakers across 4 panels covering data and AI
- Seats are limited (roughly 20 remaining as of this webinar) — reach out if interested

To see our upcoming events, [check out our events page!](#)

WHAT'S COMING NEXT

- Official rollout of UK charities data by the end of September
- London Dakota Cocktails and fundraising lunches the week of October 12
- Continued rollout of Dakota Private Markets to the allocator audience
- Additional 13F field enhancements, available through customer success teams
- New newsletter titles in the coming months
- Continued expansion of AI connector adoption across Claude, ChatGPT, and Copilot, with potential additional integrations under discussion