

Leading Through Innovation:



NAVIGATING AI, RISK, AND DEAL COMPLEXITY IN 2026

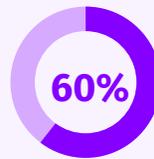
Technological innovation is shaping corporate strategy heading into 2026, with many decision-makers prioritizing increased investment in AI, data analytics, cloud solutions, and cybersecurity. As firms anticipate heightened activity across M&A, fundraising, and divestitures, they are preparing for challenges tied to tech adoption, regulatory pressure, and rising interest rates. These insights provide a clear view of priorities shaping the 2026 deal landscape.

We surveyed over 300 senior decisionmakers in private equity and investment banking—including CFOs, VPs, Managing Directors, and other key leaders—representing firms with enterprise values over \$500M or funds exceeding \$100M.

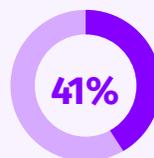
Prominent Trends



92% of finance professionals plan to increase investment in AI, data analytics and cybersecurity

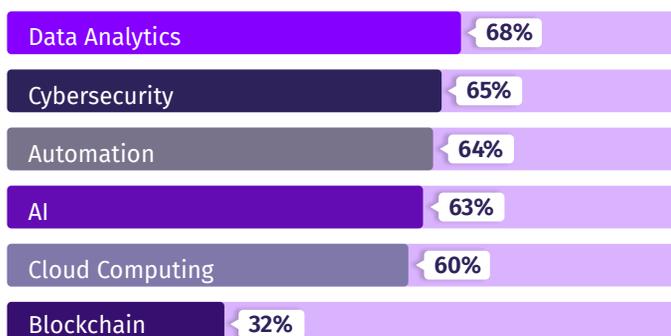


60% of decision makers cite due diligence as a "major friction point"



41% of investment bankers are preparing for heightened levels of challenges surrounding technology adoption and integration

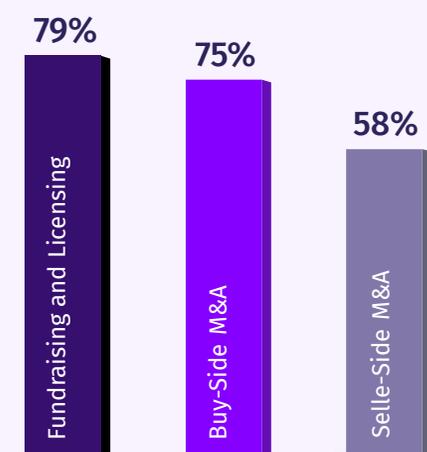
Decision makers are concentrating their techstack investment on data analytics, cybersecurity solutions, and automation



67% of decision makers at the c-suite level report saving at least 6 hours a week through AI utilization

60% of AI users are leveraging its functionality for workflow automation, with 71% of outputs being cited as reliable

More than half of interviewed decision makers are forecasting increased activity in buy-side and sell-side deals as well as in fundraising and licensing, which are emerging as top growth avenues for 2026. This anticipated uptick reflects confidence in strategic opportunities despite headwinds such as integration pressures, market volatility, and compliance demands.



Learn More

DFIN's Venue® virtual data rooms empower decision-makers by streamlining deal execution with lightning-fast setup, intuitive navigation, and advanced analytics that accelerate due diligence and collaboration. Backed by industry-leading security and granular permission controls, Venue enhances operational efficiency by reducing risk, automating workflows, and providing real-time insights for smarter, faster transactions.

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