



**CUSIP**  
**GLOBAL**  
**SERVICES**

Experience • Process  
Technology • Innovation

# Take a Tour of the AI Powered Search

Copyright © 2024 CUSIP Global Services. All rights reserved. CUSIP® Committee on Uniform Security Identification Procedures. CUSIP is a registered trademark of the American Bankers Association. CUSIP Global Services is managed on behalf of the American Bankers Association by FactSet Research Systems Inc. Permission to reprint or distribute any content from this presentation requires the prior written approval of CUSIP Global Services.

## Take a Tour of the AI Powered Search

CGS CUSIP Access now has an AI-powered search functionality that will transform the way you search and retrieve data. With the implementation of this AI-powered search feature, you can now perform advanced searches using plain text, eliminating the need to enter values into separate boxes in an advanced search window.

This AI search tool uses a large language model (LLM), specifically the GPT-4 model provided by Microsoft Azure OpenAI Service. With the aid of well-crafted, prompt engineering and other AI techniques, the GPT-4 model accurately extracts the name and value of the search field from a user-entered search prompt in natural language. It then translates the prompt into a valid structured query, which is executed by the system to retrieve precise search results.

# How to Initiate AI Powered Search

It is your default landing page however; it may be initiated by <clicking> AI-Powered Search.

CUSIP ACCESS / AI-POWERED SEARCH

**AI-Powered Search**

SEARCH PROMPT

Need help on search prompt? [Download CUSIP Search Prompt User Guide.](#)

**Saved Search Prompt**

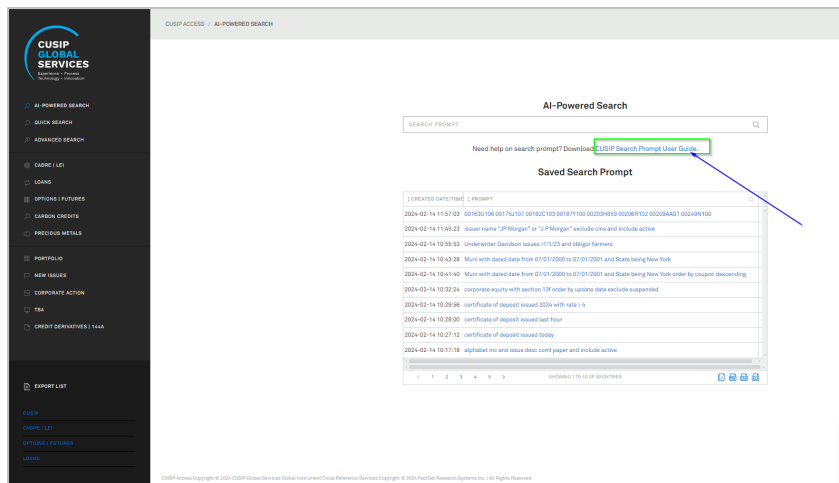
CREATED DATE/TIME	PROMPT
2024-02-14 11:57:03	00163U106 00175107 00182C103 00187Y100 00203H859 00206R102 00209A4G1 00249N100
2024-02-14 11:45:23	issuer name "JP Morgan" or "J P Morgan" exclude cirs and include active
2024-02-14 10:55:53	Underwriter Davidson issues 1/1/23 and obligor farmers
2024-02-14 10:43:28	Muni with dated date from 07/01/2000 to 07/01/2001 and State being New York
2024-02-14 10:41:40	Muni with dated date from 07/01/2000 to 07/01/2001 and State being New York order by coupon descending
2024-02-14 10:32:24	corporate equity with section 13f order by update date exclude suspended
2024-02-14 10:29:56	certificate of deposit issued 2024 with rate > 4
2024-02-14 10:28:00	certificate of deposit issued last hour
2024-02-14 10:27:12	certificate of deposit issued today
2024-02-14 10:17:18	alphabet inc and issue desc coml paper and include active

SHOWING 1 TO 10 OF 50 ENTRIES

CUSIP Access Copyright © 2024 CUSIP Global Services Global Instrument Cross Reference Services Copyright © 2024 FactSet Research Systems Inc. All Rights Reserved.

# CUSIP Search Prompt User Guide

For Prompt Tips a User Guide may be viewed by <Clicking> “CUSIP Search Prompt User Guide



The screenshot shows the CUSIP AI-POWERED SEARCH interface. At the top, there is a search prompt field with the text: "Need help on search prompt? Download [CUSIP Search Prompt User Guide.](#)". Below this is a "Saved Search Prompt" section containing a list of search queries. A blue arrow points from the link in the search prompt to the link in the saved search prompt list.

## CUSIP Search Prompt User Guide

### General Guideline:

To write a good CUSIP search prompt, ensure it is clear, specific, and utilize standard financial terminology to describe the financial instruments. Incorporate conjunctions like "with," "is," "being," "like," and "and" to aid the language model in distinguishing between attribute names and values. Use the provided prompt templates below as a guide. If the search results are not satisfactory, feel free to modify the search prompt and try again.

1. Search by Security identifier, use the prompt template [Identifier Type] + [List of Identifier]

Identifier Type	CUSIP, ISIN, Ticker
List of Identifier	CUSIP list separated by any commonly used delimiter or space. ISIN list separated by any commonly used delimiter or space. Primary or secondary ticker symbols separated by any commonly used delimiter or space.

### Prompt Examples:

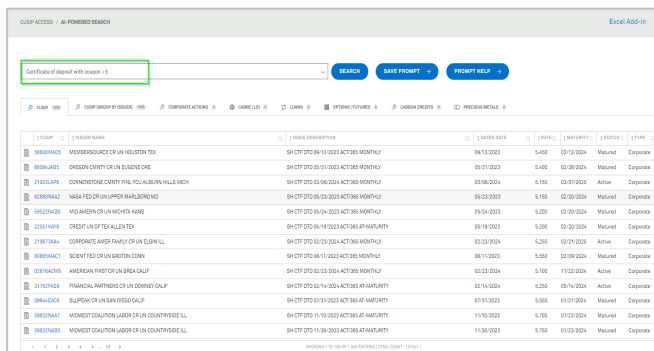
CUSIP list 303075105, 023135106

ISIN list US3030751057, US0231351067

Ticker list 4QM, FDS, TSLA, PLTR

## Search Prompt Examples

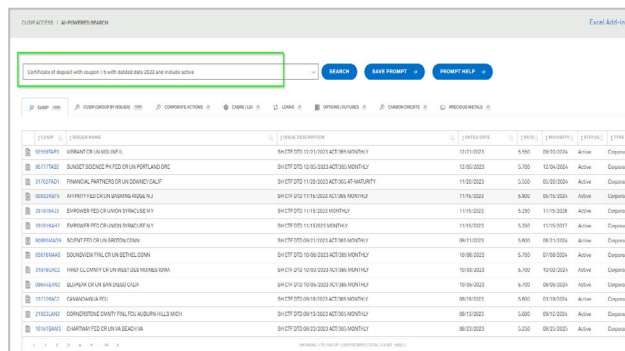
- Enter broad or specific searches.
- When provided with results the AI powered search provides users the ability to narrow results by adding additional information to search.
- “Certificate of deposit with coupon > 5” It produces 151,927 results.
- To narrow the results user may amend search to “Certificate of deposit with coupon > 5 with dated date 2023 and include active” – It produces 6,992 results.



CUSIP ACCESS | AI-POWERED SEARCH | Excel Add-in

Search: Certificate of deposit with coupon > 5

CUSIP	ISSUER NAME	SECURITY DESCRIPTION	ISSUE DATE	AMT	EXPIRES	STATUS	TYPE
080284AD	WELLS FARGO BANK NA	SH CTP 270 10 10 2023 ACT 360 MONTHLY	09 10 2023	5,400	03 10 2024	Matured	Corporate
08043A03	ORISSON COUNTY CR UN	SH CTP 270 01 01 2023 ACT 360 MONTHLY	01 01 2023	5,400	02 08 2024	Matured	Corporate
27822LAP	COMMERCE BANK OF ALABAMA	SH CTP 270 01 08 2023 ACT 360 MONTHLY	01 08 2024	5,150	02 01 2025	Active	Corporate
08082AAZ	NASD FED CR UN	SH CTP 270 01 01 2023 ACT 360 MONTHLY	01 01 2023	5,150	02 01 2024	Matured	Corporate
080284AB	WELLS FARGO BANK NA	SH CTP 270 01 04 2023 ACT 360 MONTHLY	01 04 2023	5,200	02 01 2024	Matured	Corporate
02557A9B	ORBIT UN OF TEX	SH CTP 270 01 01 2023 ACT 360 MONTHLY	01 01 2023	5,200	02 01 2024	Matured	Corporate
01813AA3	ORPHEUS AMER FAMLY CR UN	SH CTP 270 01 01 2023 ACT 360 MONTHLY	01 01 2023	5,200	02 01 2025	Active	Corporate
08082AA1	ORBIT UN OF TEX	SH CTP 270 01 01 2023 ACT 360 MONTHLY	01 01 2023	5,500	02 01 2024	Matured	Corporate
08106A03	AMERICAN FIRST CR UN	SH CTP 270 01 01 2023 ACT 360 MONTHLY	01 01 2023	5,100	11 22 2024	Active	Corporate
08176A03	FINANCIAL PARTNERS CR UN	SH CTP 270 01 01 2023 ACT 360 MONTHLY	01 01 2023	5,200	01 01 2024	Active	Corporate
08042A0C	BANK OF AMERICA NA	SH CTP 270 01 01 2023 ACT 360 MONTHLY	01 01 2023	5,500	01 01 2024	Matured	Corporate
080284AB	WELLS FARGO BANK NA	SH CTP 270 01 01 2023 ACT 360 MONTHLY	01 01 2023	6,700	01 01 2024	Matured	Corporate
080284AB	WELLS FARGO BANK NA	SH CTP 270 01 01 2023 ACT 360 MONTHLY	01 01 2023	6,700	01 01 2024	Matured	Corporate



CUSIP ACCESS | AI-POWERED SEARCH | Excel Add-in

Search: Certificate of deposit with coupon > 5 with dated date 2023 and include active

CUSIP	ISSUER NAME	SECURITY DESCRIPTION	ISSUE DATE	AMT	EXPIRES	STATUS	TYPE
080284AD	WELLS FARGO BANK NA	SH CTP 270 10 10 2023 ACT 360 MONTHLY	09 10 2023	5,400	03 10 2024	Active	Corporate
080777AD	BLANCK PRINCE PL FID CR UN	SH CTP 270 10 08 2023 ACT 360 MONTHLY	10 08 2023	5,700	10 04 2024	Active	Corporate
01813AA3	ORPHEUS AMER FAMLY CR UN	SH CTP 270 01 08 2023 ACT 360 MONTHLY	01 08 2023	5,200	02 01 2025	Active	Corporate
080284AD	WELLS FARGO BANK NA	SH CTP 270 11 01 2023 ACT 360 MONTHLY	11 01 2023	5,800	04 01 2024	Active	Corporate
08106A03	AMERICAN FIRST CR UN	SH CTP 270 11 01 2023 ACT 360 MONTHLY	11 01 2023	5,200	11 01 2024	Active	Corporate
08106A03	AMERICAN FIRST CR UN	SH CTP 270 11 01 2023 ACT 360 MONTHLY	11 01 2023	5,800	11 01 2024	Active	Corporate
080284AD	WELLS FARGO BANK NA	SH CTP 270 10 10 2023 ACT 360 MONTHLY	10 10 2023	5,700	10 02 2024	Active	Corporate
080284AD	WELLS FARGO BANK NA	SH CTP 270 10 10 2023 ACT 360 MONTHLY	10 10 2023	5,700	10 02 2024	Active	Corporate
080284AD	WELLS FARGO BANK NA	SH CTP 270 10 10 2023 ACT 360 MONTHLY	10 10 2023	5,800	04 01 2024	Active	Corporate
080284AD	WELLS FARGO BANK NA	SH CTP 270 10 10 2023 ACT 360 MONTHLY	10 10 2023	5,800	04 01 2024	Active	Corporate
080284AD	WELLS FARGO BANK NA	SH CTP 270 10 10 2023 ACT 360 MONTHLY	10 10 2023	5,200	04 01 2024	Active	Corporate

## Saving Search Prompts

AI Powered Search permits favorite prompts to be saved for continuous use.

AI-POWERED SEARCH Excel Add-in

1 hour and rate > 4

SEARCH SAVE PROMPT PROMPT HELP

CUSIP GROUP BY ISSUER CORPORATE ACTIONS CARBON LEI LOANS OPTIONS | FUTURES CARBON CREDITS PREVIOUS METALS

ISSUER NAME	ISSUE DESCRIPTION	DATED DATE	RATE	MATURITY	STATUS	TYPE
TEXAS REGL BK HARLINGEN TEX	CTF DEP DTD 03/26/2024 ACT365 AT-MATURITY	03/26/2024	5.350	04/26/2024	Active	Corporate
PEOPLESBANK HOLYOKE MASS	CTF DEP DTD 04/01/2024 ACT365 AT-MATURITY	04/01/2024	5.300	04/29/2024	Active	Corporate
PEOPLESBANK HOLYOKE MASS	CTF DEP DTD 04/05/2024 ACT365 AT-MATURITY	04/05/2024	5.300	05/06/2024	Active	Corporate
NORTHEAST CMNTY BK WHITE PLAINS NEWYORK	CTF DEP DTD 03/28/2024 ACT365 AT-MATURITY	03/28/2024	5.100	03/28/2025	Active	Corporate
NETWORK FIN CO PTY LTD	CON SER M GTO SR SECD NT	05/15/2024	5.800	05/15/2024	Active	Corporate
NETWORK FIN CO PTY LTD	GGP SER I GTO SR SECD NT	05/15/2024	5.500	05/15/2029	Active	Corporate
NETWORK FIN CO PTY LTD	USD SER I GTO SR SECD NT	05/15/2024	5.430	05/15/2031	Active	Corporate
NETWORK FIN CO PTY LTD	USD SER J GTO SR SECD NT	05/15/2024	5.470	05/15/2032	Active	Corporate
NETWORK FIN CO PTY LTD	USD SER K GTO SR SECD NT	05/15/2024	5.500	05/15/2034	Active	Corporate
NETWORK FIN CO PTY LTD	USD SER L GTO SR SECD NT	05/15/2024	5.800	05/15/2036	Active	Corporate
HARBORONE BK BROCKTON MA	CTF DEP DTD 03/22/2024 ACT365 AT-MATURITY	03/22/2024	5.300	06/24/2024	Active	Corporate
FUSHING BK UNIONDALE N Y	CTF DEP DTD 04/02/2024 ACT365 AT-MATURITY	04/02/2024	5.350	07/02/2024	Active	Corporate
FUSHING BK UNIONDALE N Y	CTF DEP DTD 04/03/2024 ACT365 AT-MATURITY	04/03/2024	5.350	07/03/2024	Active	Corporate
FUSHING BK UNIONDALE N Y	CTF DEP DTD 04/08/2024 ACT365 AT-MATURITY	04/08/2024	5.350	07/08/2024	Active	Corporate
FARMERS & MERCHANTS BK OF CENT CALIF LODI CALIF	CTF DEP DTD 03/27/2024 ACT365 AT-MATURITY	03/27/2024	5.350	04/26/2024	Active	Corporate
DART BK MASON MICH	CTF DEP DTD 03/27/2024 ACT365 AT-MATURITY	03/27/2024	5.350	06/27/2024	Active	Corporate

SHOWING 1 TO 19 OF 19 ENTRIES (TOTAL COUNT: 19)

CUSIP ACCESS / AI-POWERED SEARCH Excel Add-in

### AI-Powered Search

SEARCH PROMPT

Need help on search prompt? Download CUSIP Search Prompt User Guide.

#### Saved Search Prompt

CREATED DATE/TIME	PROMPT
2024-03-15 14:45:24	new issues last hour and rate > 4
2024-02-14 11:57:03	00163U106 00175J107 00182C103 00187Y100 00203H859 00206R102 00209AAG1 00249N100
2024-02-14 11:45:23	issuer name "JP Morgan" or "J P Morgan" exclude cins and include active
2024-02-14 10:55:53	Underwriter Davidson issues >1/1/23 and obligor farmers
2024-02-14 10:43:28	Muni with dated date from 07/01/2000 to 07/01/2001 and State being New York
2024-02-14 10:41:40	Muni with dated date from 07/01/2000 to 07/01/2001 and State being New York order by coupon descending
2024-02-14 10:32:24	corporate equity with section 13f order by update date exclude suspended
2024-02-14 10:29:56	certificate of deposit issued 2024 with rate > 4
2024-02-14 10:28:00	certificate of deposit issued last hour
2024-02-14 10:27:12	certificate of deposit issued today

SHOWING 1 TO 10 OF 50 ENTRIES

## Contact

CUSIP\_Products@CUSIP.com  
or your CUSIP Global Services  
account rep.

Visit our website  
[www.cusip.com/resources](http://www.cusip.com/resources) for  
more information on our  
products

**Want to learn more about  
the CUSIP Access and  
other CUSIP Global  
Services Products?**

# Thank you.

