



NEWS RELEASE

DFIN Introduces AI-Powered iXBRL Tagging for SEC Filings, Delivering Breakthrough Speed, Accuracy, and Control for Regulatory Compliance

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Newest capability within DFIN's Active Intelligence™ suite automates Inline XBRL tag generation and validation, reducing manual effort while maintaining compliance-grade precision.

NEW YORK, June 10, 2026 /PRNewswire/ -- Donnelley Financial Solutions (NYSE: DFIN), a leading global provider of financial regulatory and compliance solutions and the top SEC filing agent, today announced the launch of its AI-powered iXBRL tagging capability, a first-of-its-kind advancement designed to transform how organizations prepare and submit SEC financial filings.

The new solution combines advanced AI with expert human oversight to automate the tagging of regulatory filings, helping organizations improve speed, reduce manual effort, and maintain the control required in highly regulated reporting environments. DFIN is initially rolling out AI-powered tagging for Tailored Shareholder Reports (TSR) and N-CSR filings within its Arc Suite® software and for filings completed with DFIN's tech-enabled managed services offering for investment companies. The company plans to expand the capability to ActiveDisclosureSM, with other disclosure filings to follow.

"Tagging touches nearly every regulatory filing, and the time required to properly complete it is significant," said Floyd Strimling, Chief Product Officer, DFIN. "With AI-powered iXBRL tagging, we're applying automation where it matters most: helping teams move faster, reducing manual effort, improving consistency, and shortening customer cycle times while maintaining the oversight required for confidence in compliance."

iXBRL tagging is a mandatory step in SEC filing preparation, requiring every data element in a financial document to be mapped to the appropriate taxonomy before submission through the SEC's EDGAR system. Historically, this process has required specialized expertise, significant time, and thorough quality checks.

DFIN's AI-powered tagging capability fundamentally changes this model. By combining large language models with deep SEC taxonomy knowledge and experience, captured within a client-specific knowledge base built on historical filing intelligence, the solution automates initial tag generation while enabling subject matter experts to focus on validation and refinement. The result is a hybrid human-in-the-loop model that delivers both efficiency and precision, with a clear path toward increasingly autonomous, end-to-end AI-driven workflows.

Enterprise-Grade Security Built for Sensitive Data

Recognizing that pre-submission regulatory filings contain highly sensitive, material non-public information, DFIN has built its AI tagging capabilities on a secure, enterprise-grade infrastructure designed to protect client data at every stage.

Key safeguards include:

- Never using client data to train third-party LLMs, contractually enforced.
- Data remains within DFIN's private cloud, with strict isolation.
- Comprehensive audit logging for full traceability of AI activity.
- Alignment with SOC 2 and ISO 27001 standards.

Availability

The AI-powered iXBRL tagging capability is currently in a controlled production pilot for select clients, with broader availability planned for the second half of 2026.

AI tagging is a key pillar of DFIN's broader Active Intelligence strategy, which applies AI across the company's software solutions to drive smarter, faster, and more reliable outcomes for clients navigating complex regulatory environments worldwide.

Learn more in our upcoming webinar, **Beyond the Hype: Building Enterprise AI for Financial Reporting**, to gain deeper insight into DFIN's AI-powered tagging capabilities in action as well as other AI capabilities that are part of Active Intelligence.

About DFIN

DFIN is the leading global provider of compliance and regulatory software and services, fueling end-to-end investment company regulatory compliance needs, complex capital markets transactions, and essential financial reporting at every stage of the corporate lifecycle. Our mission is simple: to empower clients with the software and support they need to stay ahead of public company filings, investment company filings, private reporting, and beneficial owner reporting, while enhancing workflow efficiency. We bring deep expertise to every engagement, driving transparency and collaboration built on confidence and reliability. Learn more at DFINsolutions.com or follow us on [LinkedIn](#).

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