

Data Security for *Financial Services*

Financial services organizations, including banks, wealth management firms, insurance carriers, and fintech companies, face a data security problem that grows more complex with every expansion of the digital workflow. Non-public personal information (NPI), client portfolio records, proprietary research, trading models, and M&A data move constantly: across endpoints, into SaaS tools, through AI applications, and to third-party systems that legacy data loss prevention (DLP) was never designed to cover.

As agentic AI adoption accelerates and regulatory scrutiny under SEC, FINRA, and SOX intensifies, the gap between what DLP policies cover and what actually leaves the environment is widening.

79.7%

of financial services firms are building with agentic AI platforms, leading all industries

Cyberhaven 2026 AI Adoption and Risk Report: Financial Services

\$4.92M

average cost of a malicious insider attack, the most expensive breach vector globally

IBM Cost of a Data Breach Report 2025

\$5.56M

average cost of a financial services data breach, second highest of any industry

IBM Cost of a Data Breach Report 2025

How Cyberhaven Protects Financial Services



Protect NPI, Proprietary Research, and Financial Models

Cyberhaven tracks non-public personal information (NPI), client portfolio records, proprietary trading models, and M&A data from the moment they are created. Visibility extends across endpoints, SaaS tools, cloud storage, and AI applications without requiring file tagging or manual labeling.



Manage Insider Risk Across Front- and Back-Office Teams

Financial services organizations face insider risk from departing employees, authorized staff with routine access to sensitive data, and third-party contractors. Cyberhaven combines data movement signals with behavioral context to detect when users access or transfer proprietary research outside normal patterns.



Secure AI Adoption Without Blocking the Business

Cyberhaven tracks what NPI and proprietary data enters AI tools in real time, coaches users toward approved workflows rather than blocking them outright, and gives security teams visibility into which AI applications employees are using and what data is flowing through them.

The Data Lineage Difference

Cyberhaven's Data Lineage technology traces every piece of data from its origin, recording every copy, move, edit, and share across endpoints, SaaS tools, cloud storage, and agentic AI applications. That complete context is what makes NPI classification accurate, insider risk investigations fast, and SEC and FINRA audit timelines manageable.



Separate Compliance Risk From Routine Analyst Workflows



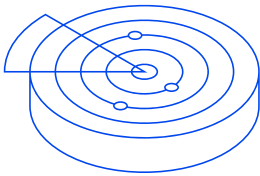
Accurate Classification Without Manual Tagging



Accelerate SEC, FINRA, and SOX Investigations

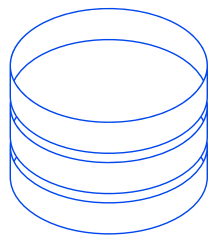
One Platform: DLP, DSPM, IRM, and AI Security

Cyberhaven delivers a unified platform so your security and compliance teams maintain full context in a single console, with no tool-switching and no lost lineage between products. Surface actionable findings instead of raw alerts, and respond without disrupting front-office or back-office work.



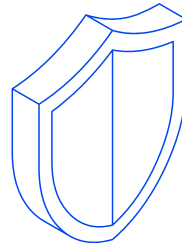
DLP

Data loss prevention (DLP) that stops exfiltration of NPI, client records, and financial models across email, web, cloud, and endpoints, with real-time user coaching.



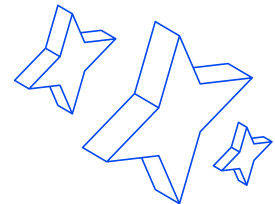
DSPM

Data security posture management (DSPM) that discovers and classifies sensitive financial data, then detects risk as it moves between clouds, SaaS tools, and devices.



IRM

Insider risk management (IRM) that combines data movement and behavior signals to detect slow-burning threats, off-cycle data access, and bulk transfers before they become reportable events.



AI Security

AI Security that tracks what enters and exits AI tools, enforces policies on unapproved applications, and governs agentic AI workflows handling NPI and proprietary research.

See What Is Happening to Your Data

Protect client data, secure AI adoption, and meet regulatory requirements as financial workflows evolve.

[Request a demo](#)

About Cyberhaven

Cyberhaven reimagines data security. AI-based classification combined with Data Lineage technology analyzes billions of data workflows to understand every piece of data within an organization, identify when it is at risk, and take action to protect it. To learn more, visit cyberhaven.com.