

How to connect Claude AI to the Quant Investing screener and run backtests in plain English

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Quant Investing MCP connection, definition:

A Model Context Protocol (MCP) server published by Quant Investing that lets Claude AI call the live [stock screener](#) (24,000 companies, 200+ factors), the [Quant Value newsletter](#) archive (since 2010), the [Shareholder Yield Letter](#) archive (since May 2023), the user's own watchlists, and a backtesting engine, using one API key. Available to [Best Deal subscribers](#).

If you are a [Best Deal subscriber](#), you can now ask Claude AI questions about the Quant Investing screener, both newsletters, and your own watchlists in plain English. Claude does the work of clicking, filtering, and reading. You get an answer in seconds.

This guide walks you through the five-minute setup. You will create an API key on your account page, add Quant Investing as a custom connector in Claude.ai, and run your first investing question.

Key facts about the Quant Investing MCP connection:

- Connection time: about 5 minutes from start to first answer.
- Tool count: 32 callable tools across the screener, both newsletters, personal data, and the backtest engine.
- Daily limit: 500 tool calls per API key per day. Backtest calls count as 5. Cached repeat answers do not count.
- Subscription required: Best Deal (Screener + Quant Value + Shareholder Yield Letter), EUR 79.70 per month or EUR 779.70 per year.

What you will need before you start

Three things, all of them free or already in place if you are a Best Deal subscriber.

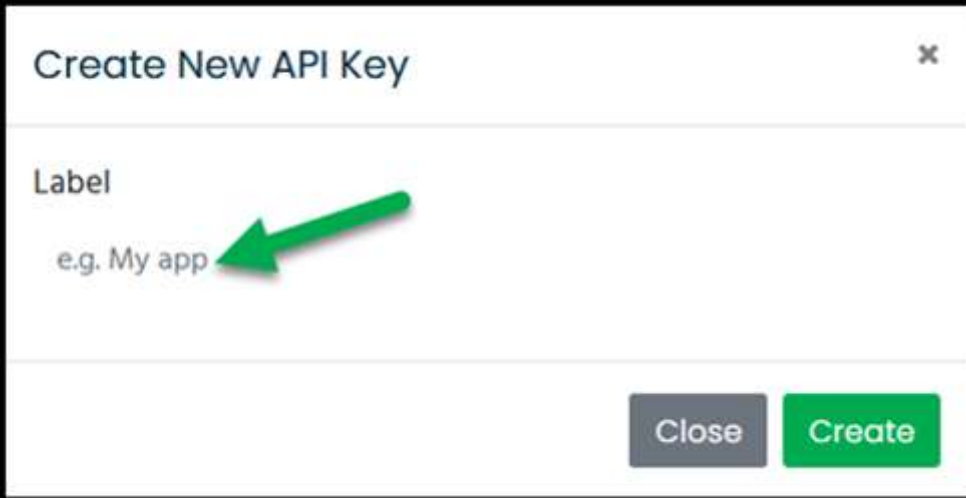
- An active [Best Deal subscription](#) (Screener plus Quant Value newsletter plus Shareholder Yield Letter). EUR 79.70 per month or EUR 779.70 per year. Other Quant Investing subscriptions do not include MCP access.

- A Claude.ai account. Free, Pro, and Max plans all work for the connection itself. A paid Claude plan increases the daily message limit on Claude's side. The MCP server limit (500 calls per day) is separate.
- About five minutes.

Step 1. Generate your API key on your subscription page

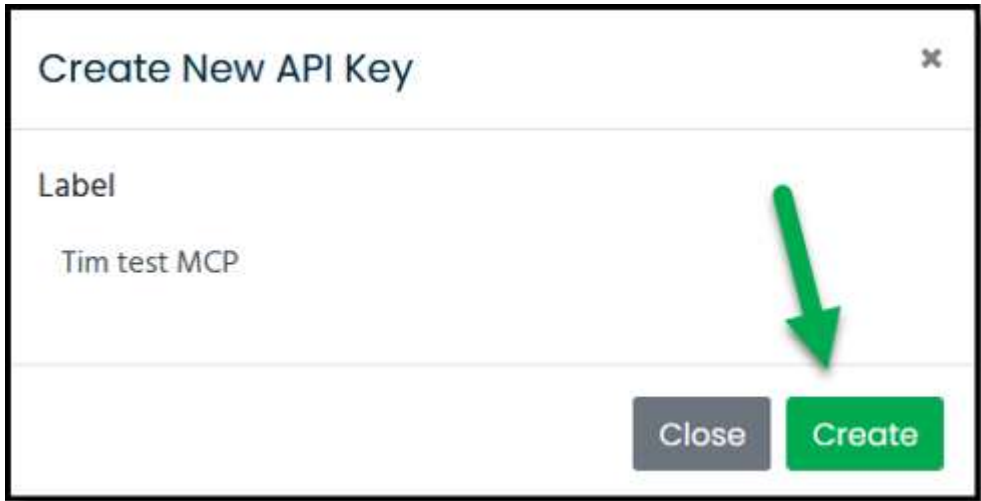
Your API key is what tells the Quant Investing server which subscriber Claude is asking on behalf of. Without it Claude has no access.

1. Log in to <https://www.quant-investing.com>
2. Go to <https://www.quant-investing.com/my-subscription>.
3. Scroll to the section headed **My API Keys**.
4. Click the green link **Create New API Key**. If you do not have a Best Deal subscription you will instead see: *"You need to have the Best Deal subscription to access API keys. Click here to subscribe."*
5. In the window that opens, type a name for your key in the field that shows *"e.g. My App"*. The name is for your own reference only. Use something like "My Claude" or "Laptop".

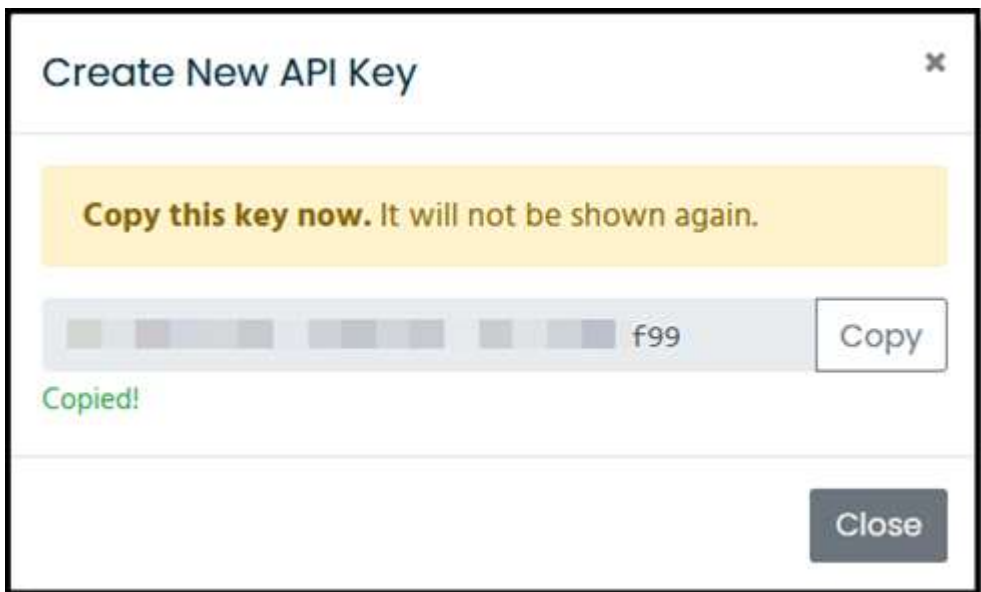


The screenshot shows a modal window titled "Create New API Key" with a close button (x) in the top right corner. Below the title bar, there is a "Label" field with the placeholder text "e.g. My app". A green arrow points to this field. At the bottom right of the modal, there are two buttons: "Close" (grey) and "Create" (green).

6. Click the **Create** button.



7. Click the **Copy** button and save the key in a safe place, for example your password manager. The key is shown only once. If you lose it you have to create a new one.



The key looks like this:

qi_live_a1b2c3d4ezu765eh8i9j0k1l2m3n4o5p

Treat the key like a password. Anyone who has it can read your subscriber data and your watchlists.

Once you have set it up successfully your subscription page should look like this.

My API Keys			
Label	Created	Active	
Tim test MCP	2026-05-03	Yes	Delete

[Create new API key](#)

Step 2. Add Quant Investing as a custom connector in Claude.ai

The full Anthropic documentation is available at [Get started with custom connectors using remote MCP](#) on the Claude help site. The short version is below.

If you are on a Claude Pro or Max plan

1. Open Claude.ai (web or desktop) and click your profile icon. Go to **Customize > Connectors**.
2. Click the + button and choose **Add custom connector**.
3. Name the connector **Quant Investing**.
4. In the URL field paste this address, replacing the placeholder with the API key you copied in Step 1:

`https://mcp.quant-investing.com/mcp?api_key=YOUR_API_KEY_HERE`

A complete URL looks like this:

`https://mcp.quant-investing.com/mcp?api_key=qj_live_a1b2c3d4e5f6g7h8i9j0k1l2m3n4o5p`

5. Leave every other field blank. No authentication header is needed. The key in the URL is the authentication.
6. Click **Add**. Claude will fetch the tool list. After a few seconds you should see a notice along the lines of "32 tools available".
7. Start a new chat. Type / and the Quant Investing tools should appear in the slash menu.

If the tools do not show up, disconnect the connector, reconnect it, and start a fresh chat. Claude only refreshes the tool list on a new connection.

Step 3. Ask Claude your first question

Open a new chat. Start every Quant Investing question with the same prefix so Claude knows which connector to use:

Use the Quant Investing MCP to...

Five questions that work today, in order of difficulty:

- **Discovery:** "Use the Quant Investing MCP. What is my quota status?" Claude calls `get_my_quota` and reports your remaining tool calls for the day. No quota is consumed.
- **Live screen:** "Use the Quant Investing MCP. Show me the top 20 European stocks by F-score above seven with ROIC above 15 percent and trading below 10 times earnings." Claude calls `screen_stocks` with the right filters and formats the result.
- **Saved screen:** "Use the Quant Investing MCP. Run my saved screen called Quality Cheap and give me the top 30." Claude calls `run_saved_screen`.
- **Backtest:** "Use the Quant Investing MCP. Run a 12-month rolling backtest on my Quality Cheap screen from January 2018 until today with `sort_by='earnings_yield'`." Claude calls `evaluate_screen_history`. Costs 5 quota units. If you want to know what the backtest actually does, see our guide on [how to back test your investment strategy](#).
- **Newsletter:** "Use the Quant Investing MCP. Backtest the Quant Value newsletter portfolio from January 2020 in EUR with EUR 100,000 starting capital." Claude calls `backtest_portfolio`. The Quant Value newsletter has a [15-year track record](#) for you to verify the result against.

How the daily quota works

Every API key has the same allowance. The rule is simple.

Tool type	Quota cost per call	Counts toward 500/day limit
Standard tools (screen, search, list, <code>get_stock_detail</code> , all newsletter tools, all personal data tools)	1 unit each	Yes
Backtest tools (<code>get_screen_snapshot</code> , <code>evaluate_screen_history</code> , <code>evaluate_newsletter_portfolio</code> , <code>backtest_portfolio</code>)	5 units each	Yes
<code>get_my_quota</code> and <code>get_cache_stats</code>	0 units	No, free
A repeat backtest that lands on a cached result	0 units	No, free for 7 days from first run

Daily reset at 00:00 UTC. A standard subscriber day looks like roughly 50 to 100 standard tool calls plus 5 to 10 backtests, well inside the limit.

Ready to put Claude on your Quant Investing screener?

The MCP connection is included with every Best Deal subscription. You get the Quant Investing screener, the Quant Value newsletter, the Shareholder Yield Letter, and the AI connector under one yearly price.

[100% money-back guarantee within 30 days](#). No questions asked.

What you can do once it is set up

The five examples above are starting prompts. Beyond them the MCP can do four things that previously required Excel, SQL, and an afternoon:

- **Cross-reference your watchlist against the newsletter portfolio in one question.** "Use the Quant Investing MCP. Which active Quant Value picks are already in my Core Compounders watchlist, and which are missing?"
- **Reopen any historical pick from the 16-year archive.** "Use the Quant Investing MCP. Pull the original analysis text for the 2018 Celestica recommendation, then compare those criteria against today's screener data."
- **Audit your own saved screens for sort-order problems.** Many saved screens silently fall back to ranking by market cap when the template has no explicit sort. "Use the Quant Investing MCP. Run audit_saved_screens. Which of my screens have no explicit sort order?"
- **Run a real strategy backtest with dividends reinvested.** The engine includes Sharpe, Sortino, Calmar, intra-period drawdown via a monthly-sampled equity curve, and an equal-weighted universe benchmark. Read more on our approach in [the QI Value investment strategy](#) page.

Get the screener, both newsletters, and the AI connector in one bundle

The MCP only works because the live screener, 16 years of Quant Value picks, and three years of Shareholder Yield Letter analyses sit in the same database. The Best Deal subscription is the only place all three meet.

[100% money-back guarantee within 30 days](#). No questions asked.

Frequently asked questions

What is the Quant Investing MCP and how is it different from an API?

The MCP is a Model Context Protocol server published by Quant Investing. It exposes 32 tools (screener filters, backtests, newsletter lookups, your watchlists) to Claude AI in a structured format Claude understands. A traditional API returns raw JSON for a developer to parse. The MCP is designed for a large language model to call directly during a chat. You do not write any code.

Which subscription do I need?

The Best Deal subscription (Screener plus Quant Value newsletter plus Shareholder Yield Letter). EUR 79.70 per month or EUR 779.70 per year. The MCP is not sold as a separate add-on. A screener-only or newsletter-only subscription does not include API key generation.

Do I need a paid Claude account?

No. The MCP works with the free Claude.ai plan. A Pro or Max plan increases the daily message limit on Claude's side, which matters if you ask hundreds of questions a day. The Quant Investing daily limit (500 tool calls per key) is separate from Claude's message limit.

How long does the setup take?

About five minutes total. Two minutes to generate the API key on /my-subscription. Two minutes to add the connector in Claude.ai. One minute for your first question.

How do I know it is working?

After adding the connector, type "/" in a new Claude chat. The Quant Investing tools should appear in the slash menu. If they do not, disconnect the connector, reconnect it, and start a fresh chat. The first call after a long idle period takes about 2 seconds (Cloudflare warming up the connection). Subsequent calls in the same chat are typically under 300 milliseconds.

What is the daily limit?

500 tool calls per API key per day. Reset at 00:00 UTC. Standard tools cost 1 unit. The four backtest tools cost 5 units each. `get_my_quota` and `get_cache_stats` are free and do not count. Cached results returned in under 100 milliseconds also do not count. The 7-day cache means repeat backtests are effectively free.

What is a saved screen and can I run my own?

A saved screen is any screener filter configuration you have saved inside your Quant Investing account. Examples: a Magic Formula screen, a Quality Cheap screen, a [QI Value strategy](#). Ask Claude *"Use the Quant Investing MCP. List my saved screens."* then *"Run my X screen and give me the top 30."*

Can I cancel after I start the subscription?

Yes. The Best Deal subscription carries a [100% 30-day money-back guarantee](#). No questions asked. After 30 days the subscription continues until cancelled.

Is my data private?

Yes. The API key is bound to your subscriber account and stored only as a SHA-256 hash on the server. Your personal data (watchlists, alerts, comments, saved screens) is scoped automatically to your user_id. No other subscriber can see your data through the MCP.

What if I lose my API key?

Create a new one on /my-subscription. The old key keeps working until you choose to revoke it. Each subscriber can hold multiple keys (one for each device, for example).

Can I use it with ChatGPT or another AI tool?

The MCP specification is open. Any client that supports remote MCP servers can connect with the same URL and key. Today Claude.ai has the most complete MCP client. ChatGPT support is on Anthropic's published interoperability roadmap.

How is this different from Stockopedia, Simply Wall Street, or Stock Rover?

None of those services currently expose an MCP connection to Claude or any other AI model. None of them combine a 16-year newsletter archive with live screener data in one query. The Quant Investing combination of live screener, 16 years of Quant Value plus 3 years of Shareholder Yield Letter content, and a working backtest engine is currently unique.