



MUFG Pension & Market Services



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MUFG Pension & Market Services and Microsoft Announce Five-Year Strategic Partnership to Transform Superannuation and Investor Services

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MUFG Pension & Market Services (MPMS) has announced a five-year strategic partnership with Microsoft aimed at accelerating the global adoption of AI-powered solutions across its MUFG Retirement Solutions and MUFG Corporate Markets business divisions.

The long-term agreement is built on a co-investment model, with Microsoft providing expertise, technology and enablement to drive innovation at scale across MPMS operations in Australia, New Zealand, India, Hong Kong and the United Kingdom. The partnership reflects a shared commitment to building modern, secure and intelligent financial services that deliver tangible outcomes for superannuation & pension funds and their members, and listed entities and their investors.

"This collaboration with Microsoft is about creating smarter, AI-powered experiences for our clients - while keeping the human experience at the centre. Whether it's using advanced AI to help a member access their pension or giving listed companies intelligent tools to better engage with shareholders, we're focused on solutions that remove friction and add value," said **Vivek Bhatia, CEO & Managing Director, MUFG Pension & Market Services**.

"The scale and certainty of a five-year strategic partnership allows us to confidently leverage Microsoft's cutting-edge AI capabilities, modernise rapidly, and deliver innovations across the member and investor journey on behalf of our clients. It also allows us to invest in our people as we create the 'roles of the future' to deliver solutions that matter most to our clients."

"At Microsoft, we believe AI has the potential to redefine every industry - and financial services is no exception," said **Rodrigo Kede Lima, President, Microsoft Asia**.

"Our partnership with MUFG Pension & Market Services is a powerful example of how AI can be used responsibly and at scale to deliver meaningful outcomes for people - from simplifying pension access to modernising investor engagement. We're proud to bring the full strength of Microsoft's technology and expertise to help MPMS lead with innovation across the markets they serve."

The partnership will focus on two key areas of transformation, member experience and investor experience:

- MPMS will harness Microsoft's AI technologies to enhance and automate core superannuation processes, to enhance service-levels and member experience overall. This will enable faster, more accurate, and more personalised support during critical life events.

- MPMS will deploy AI to streamline investor communications, reduce manual handling, and enable straight-through processing. These will deliver a simpler, more transparent experience for listed companies and their shareholders.

As part of the transformation, MPMS has already begun rolling out Microsoft 365 Copilot and GitHub Copilot to uplift productivity, enhance knowledge management, and embed AI literacy across its workforce. These tools are enabling faster delivery of digital services and smarter ways of working, particularly in frontline and client-facing functions.

All AI and cloud initiatives will be built on Microsoft's secure-by-design principles to ensure compliance with data governance, privacy, and regulatory requirements across jurisdictions. The roadmap includes joint investment in AI governance frameworks, capability building, and production-grade deployment of agent-based services.

This five-year agreement builds on MPMS' recent investments in cloud modernisation and positions the organisation to lead the next wave of transformation in superannuation and investor services.

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About MUFG Pension & Market Services



MUFG Pension & Market Services

MUFG Pension & Market Services is a member of MUFG, a global financial group. We are a global, digitally enabled business that empowers a brighter future by connecting millions of people with their assets – safely, securely and responsibly.

Through our two market leading businesses MUFG Retirement Solutions and MUFG Corporate Markets, we partner with a diversified portfolio of global clients to provide robust, efficient and scalable services, purpose-built solutions and modern technology platforms that deliver world class outcomes and experiences.

We help manage regulatory complexity, improve data management and connect people with their assets, through exceptional user experience that leverages the expertise of our people combined with scalable technology, digital connectivity and data insights.

About Microsoft



Microsoft (Nasdaq "MSFT" @microsoft) enables digital transformation for the era of an intelligent cloud and an intelligent edge. Its mission is to empower every person and every organisation on the planet to achieve more.

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