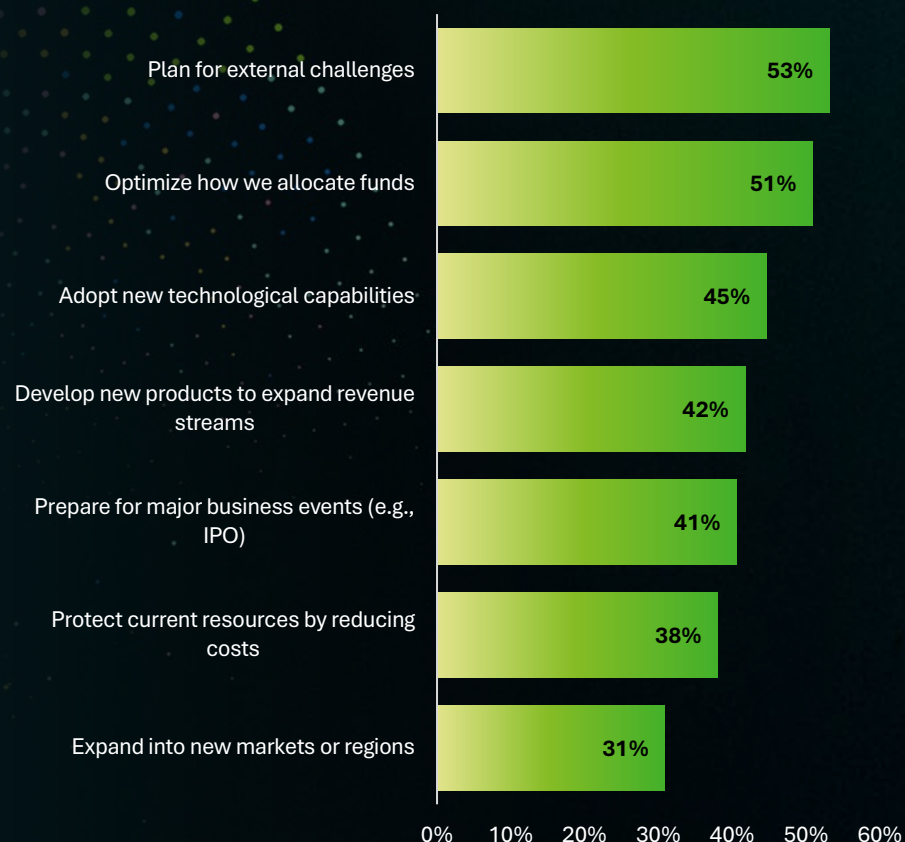


Finance Trends 2026: Financial Services Perspective

Deloitte polled 175 CFOs and senior finance professionals from companies within the Financial Services Industry (FSI) with annual revenues of US\$1 billion or more.

Many FSI leaders are focusing on several priorities, from planning for external challenges to optimizing fund allocation

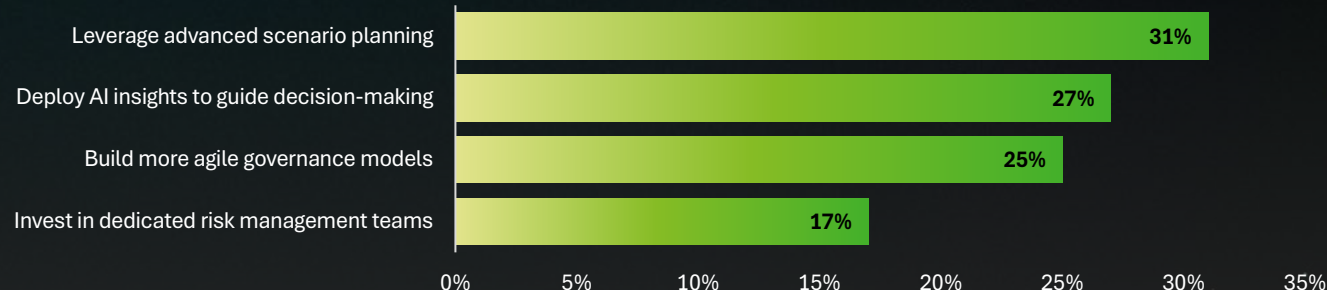
TOP 3 FSI RESPONDENT PRIORITIES THROUGH FY 2026



TREND 1

The speed priority—Advanced scenario planning and agile governance for navigating uncertainty

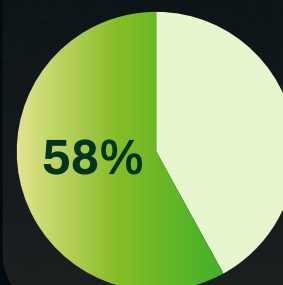
Surveyed FSI leaders cite better anticipation of needs and more agile responses as most important for managing uncertainty more effectively.



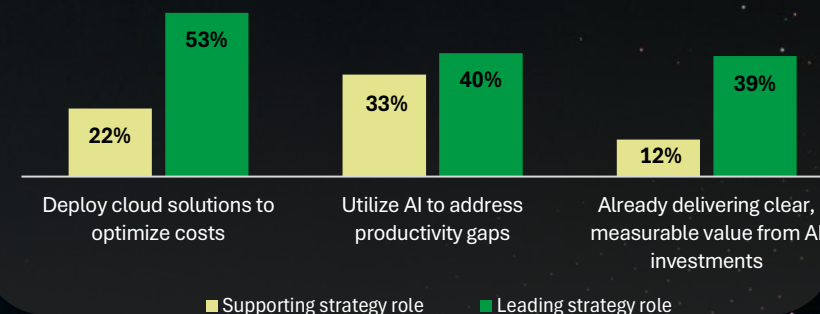
TREND 2

Finance leaders are stepping up as strategy leaders—especially when they embrace advanced AI and cloud

Many FSI respondents use cloud and AI to scale their influence.



Of surveyed FSI leaders **play a leading role** influencing enterprise strategy

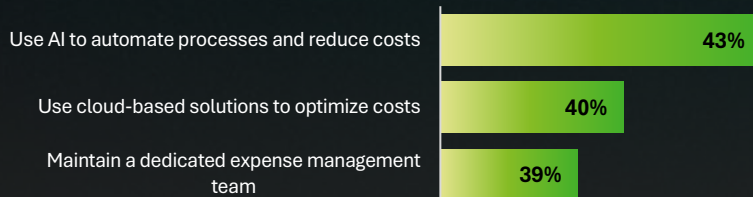


TREND 3 Focus. Precision. Discipline—How finance-led cost management helps drive measurable value
Many surveyed FSI leaders focus on AI and cloud to optimize costs.



of surveyed cost and expense management owners deploy at least one of the following three tactics:

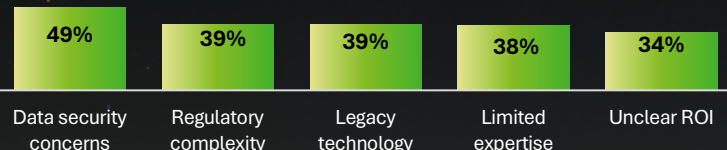
TOP 3 COST MANAGEMENT TACTICS REPORTED BY SURVEYED FSI LEADERS



TREND 4 The journey to agentic insights—Many finance teams embrace AI, but ROI and agentic implementations often lag
Data security concerns and regulatory complexity hinder AI adoption for many respondents in FSI.

While 57% of respondents fully deployed an AI solution in finance, only 7% have also demonstrated measurable value and integrated at least one agentic solution

TOP AI CHALLENGES FOR FSI RESPONDENTS

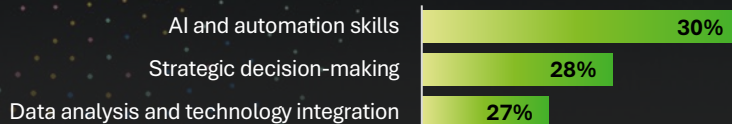


Top three opportunities cited for agentic AI

1. Working capital optimization (53%)
2. Financial planning and analysis (49%)
3. Sales and profitability management (36%)

TREND 5 Infusing tech talent in finance—Where data scientists and accountants meet
Technical and human skills are of priority for many surveyed FSI executives.

TOP 3 SKILLS PRIORITIZED THROUGH 2026 FOR FSI RESPONDENTS



64%

Of FSI respondents choose at least one technical skill as a top development priority through 2026

Collectively, these trends illustrate the integral—and increasingly more prominent—role finance leaders are often playing in helping their organizations optimize costs, catalyze innovation, and orchestrate a strategic agenda that fuels enterprise-wide growth and value.

Finance Trends 2026

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