The American Journal of Applied Sciences
ISSN 2689-0992 | Open Access

TYPE Original Research
PAGE NO. 101-110
DOI 10.37547/tajas/Volume07Issue07-11

Redefining Entry-Level Analyst Roles in M&A: Essential Skillsets in the Age of AI-Powered Diligence

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OPEN ACCESS

SUBMITED 14 June 2025
ACCEPTED 24 June 2025
PUBLISHED 23 July 2025
VOLUME Vol.07 Issue 07 2025

CITATION

Shounik, S. . (2025). Redefining Entry-Level Analyst Roles in M&A: Essential Skillsets in the Age of AI-Powered Diligence. The American Journal of Applied Sciences, 7(07), 101–110. https://doi.org/10.37547/tajas/Volume07Issue07-11

Abstract: The mergers and acquisitions field within investment banking is changing because artificial intelligence tools like natural language processing and machine learning are now part of everyday work. Historically, entry-level analysts performed extensive data-driven analyses crucial for executing transactions, but this role has been significantly influenced by the introduction of AI. This study explored how AI has altered the duties and skill requirements for junior analysts in M&A environments. A qualitative content analysis framework was used to synthesize insights from over 50 reports, journal articles, case studies, and industry surveys published between 2020 and 2025. Data were collected from reputable sources, including global consulting firms, academic journals, and financial services publications. Through an in-depth literature review, new critical skills were identified. These encompassed advanced data analysis, proficient prompt engineering, and thorough validation of AI models. The results highlighted a need for analytical flexibility, technological expertise, and adaptability among analysts entering the industry. As a result, investment banking firms focused on M&A were compelled to update training programs and redefine analyst responsibilities. Adopting these skills helped facilitate a smoother shift into technology-enhanced workflows, ultimately allowing analysts to contribute greater strategic value towards transaction processes. But there are still obstacles to overcome, especially when it comes to relying too much on AI and not having enough human supervision to avoid algorithmic mistakes. Looking

outward, we see that analysts are turning into AI-enabled specialists, combining their knowledge with digital abilities to improve deal outcomes.

Keywords: Investment Banking, Mergers and Acquisitions, M&A, Artificial Intelligence, AI-powered Diligence, Financial Analyst.

1. Introduction

1.1 Traditional Analyst Responsibilities

Entry-level analysts in mergers and acquisitions have long been the backbone of deal teams, performing data-heavy and repetitive tasks such as gathering financial information, updating valuation models, and preparing pitch documents under the guidance of senior bankers. These responsibilities traditionally served as a gateway to mastering financial principles and industry context. Many of these tasks are being quickly automated by the growth of artificial intelligence. Generative AI tools can now summarize due diligence reports, identify risks, draft memoranda, and retrieve regulatory references (Ellencweig et al., 2024). These are tasks that once required significant analyst time. A generative AI tool created a client briefing in minutes, a process that used to take a junior team one to two days (Giovine et al., 2023). This shift signals a redefinition of the entry-level analyst role, as fundamental analysis and data collection become increasingly AI driven.

1.2 AI-Driven Disruption

This transformation has exposed a disconnect between conventional analyst development and evolving job expectations. While training still emphasizes manual modeling and data gathering, analysts must now interpret AI outputs, assess their accuracy, and provide higher-order insights through hands-on learning. As the apprenticeship model fades, new analysts may lack the context and experience to validate results, craft effective prompts, or exercise sound judgment (Grennan & Michaely, 2020).

1.3 The Skill Gap and Institutional Lag

Complementing the issue is a general lack of structured training in AI literacy, prompt engineering, and algorithmic oversight. As a result, analysts are being asked to demonstrate critical thinking, technical fluency, and business judgment much earlier in their careers. Firms that fail to adapt may find junior staff misusing AI tools or introducing errors into diligence processes (Freire-González, 2025). Conversely, companies that improve their training and recruitment efforts to prioritize skills like interpretation and effective AI use are more likely to fully capitalize on the productivity enhancements that AI can bring. There is growing consensus in industry commentary that hybrid skill sets combining finance, data analysis, and ethical reasoning are becoming essential (Vankadoth, 2025). However, without proper protections, relying too much on AI might weaken fundamental skills like communication and critical thinking (Maple et al., 2023).

1.4 Research Gap and Study Objective

Despite rising attention to AI in financial services, academic inquiry into its specific impact on entry-level M&A roles remains limited. Existing literature tends to focus on broader trends such as algorithmic trading or enterprise-level AI adoption, rather than the day-to-day evolution of analyst responsibilities. This paper aims to address that gap by examining how AI tools are reshaping analyst duties, identifying the emerging skills required, and evaluating how well current training initiatives are keeping pace. The research methodology employs qualitative content analysis of over 50 academic and industry sources published between 2020 and 2025, using thematic coding and triangulation to extract insights across four key focus areas.

2. SCOPE

This research examines the evolving role of entry-level M&A analysts in investment banks and private equity firms from 2020 to 2025, specifically focusing on the integration of NLP, ML, and generative AI. The study aims to provide targeted insights for educational institutions, financial firms, and policymakers, helping them ensure that talent development strategies remain aligned with AI-driven changes in the industry.

The main objectives of the research are:

- To investigate how AI tools are changing the responsibilities of entry-level M&A analysts.
- To determine the new skills needed for junior analysts in AI-enhanced M&A industry.
- To assess how well current training programs prepare analysts for AI-enhanced workflows and to identify key gaps.

To provide recommendations for bridging the skill gap and redefining the analyst role in the AI era, while addressing risks like over-reliance on AI.

3. Methodology

3.1 Data Selection

Data was gathered from a number of credible sources in both the corporate and academic spheres. These included reports and strategies put out by multinational consulting firms like Bain & Company and McKinsey, findings from global conferences like the World Economic Forum, assessments done by IT consulting companies, and scholarly articles published in journals like the Journal of Financial Economics. Every source selected was published between 2020 and 2025 and assessed for reliability, relevance, and worldwide applicability. Reliability was determined by the source's reputation, methodology, and peer-review status. Relevance was assessed based on the source's direct connection to AI in M&A. Worldwide applicability was evaluated by considering the source's geographical scope and generalizability. We analyzed over 50 reports, articles, and case studies, synthesizing the data using content analysis to identify key trends, patterns, and insights (Khanna, 2021). Potential biases in the data sources were addressed by cross-referencing information and prioritizing sources with transparent methodologies.

3.2 Areas of Focus

Thematic analysis was employed to pinpoint and categorize the major themes and trends emerging from the collected data about AI's economic ramifications, and visualization tools like bar charts and line graphs aided in pattern identification (Sood & Khanna, 2024). This study examines four key areas:

AI integration in M&A due diligence (using tools like ChatGPT for document summarization).

Operational workflow transformation (automating tasks like data entry the the use of Co-pilot in excel).

Skill gaps (comparing traditional training to AI skill needs like prompt engineering).

Institutional response (updated training initiatives).

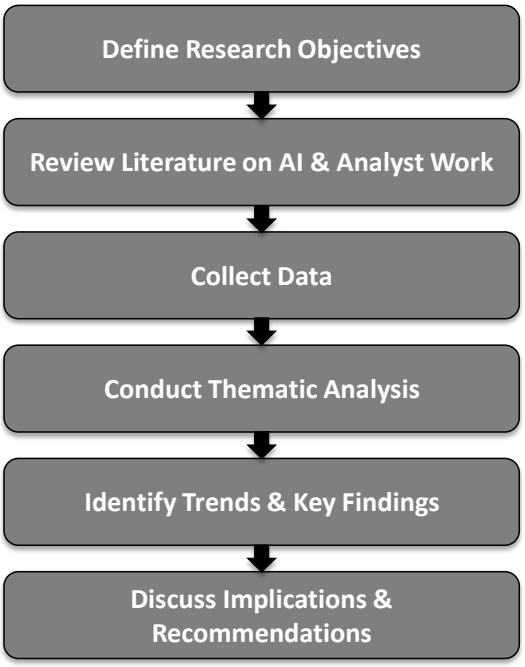
These areas were selected to provide a comprehensive view of how AI reshapes the M&A landscape and the necessary adaptations for industry professionals (Sood & Khanna, 2024).

3.3 Research Framework

A number of conclusions were systematically categorized, compared, and synthesized within the analytical framework (Odonkor et al., 2024). Qualitative content analysis, involving systematic coding using pre-defined and emergent approaches with reliability checks, was conducted. Analytical codes included: AI-automated tasks, emerging analyst skillsets, institutional responses, and risks of over-reliance on automation. Qualitative insights and quantitative indicators were integrated via triangulation to validate findings. This rigorous method ensured the accuracy and comprehensiveness of the analysis, allowing for nuanced insights into the transformation of M&A analyst roles (Perifanis & Kitsios, 2023).

Table 1. Research Framework

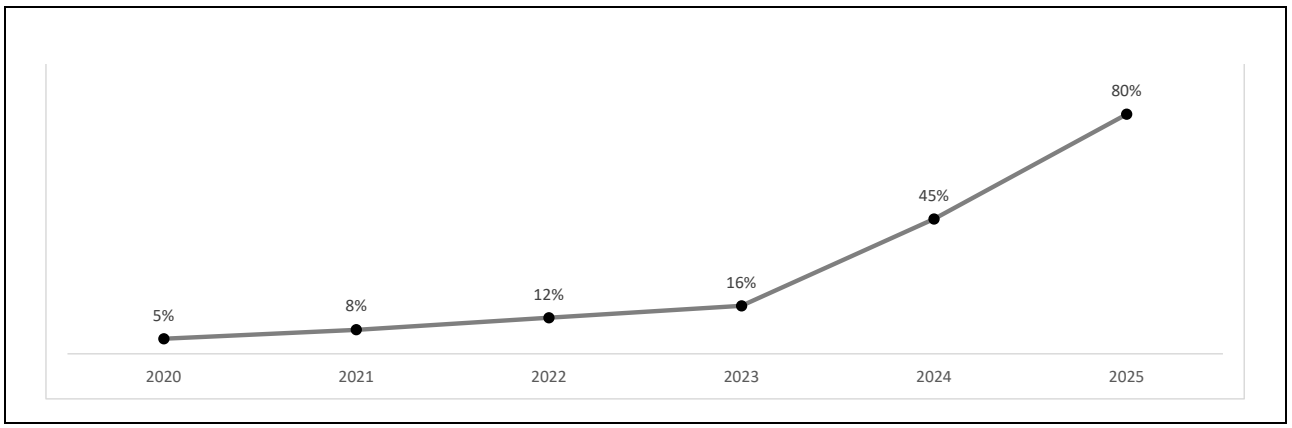
Stage	Description
Research Objective	Analyze how AI (e.g. NLP, ML, GenAI) is transforming the M&A analyst role
Literature Review	Synthesized prior work on AI in finance, automation of white-collar work, and analyst skill evolution
Conceptual Framework	Four key themes: Task Automation, Evolving Skillsets, Institutional Responses, Risk & Governance
Methodology	Qualitative thematic analysis + selective industry reports, case examples, and interview references
Analysis Approach	Identify task categories impacted by AI, map skill shifts, assess firm responses
Key Findings	Summary of transformation pathways + implications for analysts and employers



4. Results And Discussion

4.1 Ai-Powered Automation Of M&A Tasks (2020–2025)

From 2020 to 2025, AI fundamentally reshaped internal M&A processes, automating tasks previously handled by junior analysts and shifting their role from "collecting and calculating" to "validating and interpreting" machine-generated insights (Freire-González, 2025). Early adopters reported productivity gains, faster timelines, and cost reductions (Fang et al., 2025). Some companies even incentivized early AI adopters. Although AI enabled the evaluation of more targets and faster processes, there was concern about overemphasizing speed over accuracy, with users potentially neglecting qualitative factors. Companies prioritizing workforce development showed greater digital transformation success. AI integration yielded efficiency gains (Alam et al., 2025), but required a balanced approach, emphasizing both technological skills and critical thinking for analysts.



Data: 78% productivity gains, 54% faster timelines, 42% cost savings from generative AI usage.
Source: Bain & Company. (2024). *Generative AI in M&A: Where Hope Meets Hype*
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Figure 2. AI Tool Adoption in M&A (2020-2025)

4.1.1 Document Review

Generative AI tools analyze deal documentation, producing summaries and risk indicators, and draft initial deal memoranda to identify contractual risks (Fang et al., 2025). One case study demonstrated that target identification time was significantly reduced with improved accuracy (Ellencweig et al., 2024). Tasks such as transferring figures from PDFs to Excel, which previously took days per deal, were completed in minutes with minimal errors (Betts & Jaep, 2017). As a result, analysts can focus on data visualization and interpreting insights. However, AI's limitations in human-oriented aspects still requires analyst verification, and dependence on AI poses a risk to critical thinking skills development.

4.1.2 Automated Drafting of Deal Documents

Generative AI tools create initial drafts of standard M&A documents, expediting the preparation process (Freire-González, 2025). AI can produce investment memos, executive summaries, regulatory submissions, and press releases. For example, one case study showed a genAI platform independently compiling structured due diligence reports (Ellencweig et al., 2024). Moreover, pitch book drafting time can be reduced by roughly 30% using genAI (Freire-González, 2025). However, mistakes stemming from algorithmic hallucinations and lapses in human oversight remain significant threats (Giovine et al., 2023).

4.1.3 Deal Sourcing and Target Identification

NLP and machine learning analyze diverse datasets to identify potential acquisition opportunities (Maple et al., 2023). AI-driven tools help M&A teams discover high-potential targets (Emmi, 2025). For example, a consumer goods company reduced a candidate pool from 1,600 to 40 using an AI system (Ellencweig et al., 2024). As a result, junior analysts shifted their focus from primary market research to deeper qualitative assessments.

4.1.4 Valuation Modeling and Analysis

While valuation modeling remained largely human-led, AI aided these processes by gathering and organizing financial data from unstructured sources (Geertsema et al., 2025). AI also simulated deal structures and predicted financial outcomes, improving valuation accuracy and iteration speed (Antwi et al., 2024). Furthermore, AI processed contracts to extract financial terms for valuation models, a task previously taking days (Tribe.ai, 2025). Consequently, automated data collection enabled faster and more agile valuations.

4.1.5 Deal Process Management

Generative AI has facilitated post-transaction activities like integration planning and project management (Ellencweig et al., 2024). AI-driven agents, trained on company-specific M&A playbooks, provide real-time knowledge support throughout integration (Ellencweig et al., 2024). These systems create customized integration roadmaps and TSAs. Early adopters can now produce comprehensive TSA documents and integration workplans in less than 20% of the time previously required, condensing processes that once took weeks into a single day (Ellencweig et al., 2024).

4.1.6 Acceleration of Industry-Wide Adoption

GenAI adoption is accelerating. Bain & Company projects adoption will surpass 80% by 2026-2027 (Haxer et al., 2025). A 2024 survey revealed that 97% of M&A dealmakers expect AI to significantly influence transaction workflows (Haxer et al., 2025). Companies that do not embrace AI risk lagging in deal execution (Haxer et al., 2025). As a result, the demands on entry-level employees are shifting to data analysis, prompt engineering, and model validation (Fang et al., 2025). Analysts will increasingly operate as strategic contributors, dedicating more time to high-level insights and client interaction, and potentially emerging as “AI-empowered advisors” (Grennan & Michaely, 2020).

Table 2. Traditional vs AI-Augmented Analyst Tasks

Traditional Analyst Tasks	AI-Augmented Analyst Tasks
Data collection from filings	AI output validation
Manual Excel modeling	Prompt engineering
Building pitch decks	Data visualization
Compliance document prep	Strategic synthesis
Manual market screening	Workflow automation oversight

4.2 Evolving Skill Requirements for Entry-Level Analysts

The increasing integration of AI into M&A processes has significantly reshaped expectations for entry-level analysts. While foundational skills like financial modeling, diligence precision, and data handling remain crucial, the emergence of AI-driven tools has necessitated the development of advanced technical, analytical, and supervisory skills. Entry-level analysts are now increasingly expected to integrate outputs from AI applications with financial insights and contextual understanding, serving as liaisons between automated platforms and human decision-makers (Odonkor et al., 2024).

4.2.1 AI and Data Literacy

Proficiency in AI tools is crucial for analysts, who utilize document analysis, data extraction, and visualization software, while also cultivating skills in prompt engineering. Prompt engineering is an essential competence, requiring analysts to formulate effective queries for generative models. AI literacy encompasses awareness of model limitations and insight into when human validation is essential (Hanegan, 2023). Deloitte advocates systematic onboarding into AI-enhanced workflows. From 2022 to 2023, there was an 80-fold rise in European professionals showcasing AI-related skills on LinkedIn (Deloitte, 2023).

4.2.2 Automation Oversight

Analysts continuously improve outputs through contextual enhancement and by understanding model limitations. As a result, they supervise the quality assurance process as an administrator. Therefore, supervision of AI-generated content is an organizational priority. To this end, analysts verify data accuracy, identify hallucinations, and cross-reference details. A survey revealed that 25% of M&A professionals recognized "quality control and reliability" as the primary obstacle in AI implementation (Ellencweig et al., 2024). Junior professionals receive training to conduct thorough validations, and companies formalize this role under new fields such as "AI assurance" (Fedyk et al., 2022; Morandini et al., 2023).

4.2.3 Continuous Learning

As AI tools rapidly evolve, analysts prioritize continuous learning (Baskin, 2023). Successful junior professionals quickly adopt new platforms and incorporate them into workflows. Many organizations foster a culture of experimentation and encourage knowledge sharing, leading to the informal emergence of “genAI champions” who promote AI adoption internally. This environment necessitates readiness for technological advancements, a willingness to question traditional workflows, and an understanding of ethical and compliance issues. "AI upskilling" should be viewed as a continuous institutional endeavor. Analysts who take the initiative to enhance their skills exhibit greater adaptability and resilience (Morandini et al., 2023).

4.3 Institutional Responses: Training and Team Structure

In light of the rapid integration of AI technologies into M&A processes, firms in the financial and professional services industries made a range of organizational training modifications (Fang et al., 2025).

4.3.1 Training and Upskilling Initiatives

Acknowledging the expanding disparity between current skill levels and new requirements, numerous companies have introduced organized AI upskilling initiatives. A 2024 survey indicated that 43% of M&A professionals had already committed resources to AI-related training, with another 17% planning to do so (SS&C Intralinks, 2024). Training methods varied, ranging from formal education in AI tools and data analytics to workshops focusing on prompt engineering. Interactive GenAI workshops, especially those including

real deal scenarios, proved effective in speeding up tool adoption among junior personnel (Giovine et al., 2023). Organizations have also incorporated AI-centered modules into onboarding processes. McKinsey highlighted the necessity for widespread AI education, suggesting that ongoing exposure to various applications is beneficial (Brown et al., 2019). Personalized training programs can also be generated, tailored to the function of an integration team member, acquisition type, and deal timing (Ellencweig et al., 2024).

4.3.2 Team Restructuring and Workflow Reconfiguration

Institutions also reassessed their team structures and workflow designs, reevaluating the traditional pyramid model. Streamlined deal teams are now expected, where fewer junior staff, augmented by AI, can achieve similar results. Restructuring M&A teams to better align with AI-enhanced processes is being contemplated. New operational positions are emerging to oversee automated diligence tools and bridge the gap between deal teams and technology departments (Freire-González, 2025). A human input is still necessary for all AI-generated outcomes, thus new governance frameworks are in the works to make sure these technologies supplement human knowledge rather than replace it (Khanna, 2021).

4.4 Risks and Challenges of Over-Reliance on AI

Even though the advantages of incorporating AI into M&A processes are evident, numerous risks have arisen related to an excessive reliance on automation. These risks encompassed issues with data reliability, a decline in critical thinking skills, difficulties in talent development, a sense of cultural complacency, and possible compromises between the speed of deals and their quality.

4.4.1 Data Accuracy

Generative AI systems are prone to hallucinations (Vankadoth, 2025). In high-stakes M&A scenarios, such inaccuracies pose considerable valuation and reputational dangers. Accuracy is a primary concern for AI users. Companies are implementing protocols to validate AI-generated information against original documents and maintaining a human-in-the-loop framework. It will also become more challenging for the public to discern when outputs are incorrect. The JPMorgan-Frank case serves as a stark cautionary tale, highlighting that robust AI-driven due diligence is crucial, especially when evaluating AI startups (Freire-González, 2025).

4.4.2 Erosion of Foundational Analyst Skills

Automation poses a risk to the traditional pathways of skill development: if essential functions are completely assigned to AI, entry-level professionals could become excessively dependent on automation, which would hinder their long-term growth. Another potential issue is skill obsolescence, which occurs when workers lose the capacity to adapt to changing job requirements or technological advancements. (Chowdhury et al., 2024). Mentorship programs and allocating more analytical tasks to junior analysts can help mitigate this.

4.4.3 Overdependence and Complacency

Cultural risks also arise from a growing reliance on AI tools, where analysts might stop questioning model assumptions or results, thus jeopardizing the quality of diligence (Ellencweig et al., 2024). Assessing generative AI output can take as much time as creating documents from scratch, which emphasizes the ongoing need for human oversight. Furthermore, bias present in training data presents risks, requiring analysts to identify and challenge outputs that could indicate algorithmic biases.

Table 3. Risks of AI and Firm Responses

Key Risks	Firm Safeguards
AI Hallucinations	Human-in-the-loop validation
Loss of Analyst Skill Development	Mentorship & manual task exposure
Overdependence on AI	Analyst-led quality checks
Data Privacy Risks	Secure internal AI systems
Bias in Model Outputs	Bias auditing protocols

4.5 Limitations of the Study

This study, while insightful, has limitations. Its findings may not generalize across all regions, firm sizes, or industry sectors due to the specific timeframe (2020-2025) and focus on entry-level analysts. The accuracy depends on the quality of data sources, with potential biases from data collection and interpretation methodologies. Assessing AI's impact involves subjective interpretations, though the study attempts to mitigate this with triangulation of multiple sources. The rapid evolution of AI may render some conclusions outdated. Due to other contributing variables, it is difficult to establish conclusive correlation between the adoption of AI and the observed changes. Lastly, analysts' and businesses' self-reported statistics might be biased. Future study might expand the breadth, diversify data, and apply more rigorous methodologies, but it is important to acknowledge these limitations in order to make a fair judgment.

5. Conclusion

From 2020 to 2025, AI-powered diligence tools transformed the entry-level M&A analyst role, automating routine tasks and improving efficiency in deal sourcing, document examination, modeling, and reporting. While technical skills remain important, proficiency in prompt engineering, data visualization, and interpreting AI-generated insights has become crucial. Soft skills like analytical reasoning and communication are also essential for verifying AI outputs and contextualizing results (Ellencweig et al., 2024).

Companies are adapting through training programs and strategic hiring. However, over-reliance on AI poses risks to critical thinking and professional judgment. Strong oversight, ethical standards, and mentorship are needed to maintain human expertise, especially considering potential algorithmic errors and the need to balance speed with thoroughness (M&A Science, 2025). As highlighted in the editor, some junior professionals are worried about job stability, making it important to emphasize AI as a supportive tool.

Looking ahead, analysts will increasingly focus on strategic contributions, collaborative analysis, and client interaction, with AI handling routine tasks. Firms prioritizing a dual-track evolution will be successful. As (Freire-González, 2025) suggests AI-powered analytics can deliver up to 3x ROI in financial processes.

In summary, AI is redefining, not eliminating, the entry-level M&A analyst role. Cultivating AI skills alongside financial expertise is key for analysts, while strategic reorganization and a human-centered focus are essential for organizations. This transition, if managed thoughtfully, can unlock talent and ensure human insight remains central to high-quality dealmaking.

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