Hackverse 2025

CSI WIET
EMPOWERING INNOVATION THROUGH CREATIVITY

WealthWise

Domain - FINTECH

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INTRODUCTION

- **WealthWise** is an AI-powered **personalized wealth management platform** designed to simplify financial planning.
- It provides users with **customized financial analytics** based on their **income and expenses**.
- **Smart investment planning** for **Stocks, Mutual Funds, and Fixed Deposits** based on AI-driven insights.
- **Interactive Learning** 📚: Gain financial education through a **chatbot and recommended videos**.
- **Virtual Stock Market Experience** : Invest with **dummy money** to **practice trading without real risk** and improve financial decision-making skills.

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PROBLEM STATEMENT

Existing System

- **Lacks Deep Personalization**: Stock recommendations are often generic, missing user-specific preferences.
- **Basic Financial Analytics**: Current tools rely on **simple metrics** that do not provide **comprehensive planning insights**.
- **No Risk-Free Investment Practice**: Users must invest **real money** to experience the market, leading to hesitation and potential losses.

Proposed System

- **AI-Powered, Fully Personalized Investment Plans** for **Stocks & Mutual Funds** tailored to user goals.
- **Comprehensive Financial Insights** : Track expenses, optimize savings, and receive **detailed analysis**.
- **Risk-Free Stock Market Practice**: Users can invest in **real-time market prices** using **in-app dummy currency**, ensuring **a safe learning environment**.

CHALLENGES AND SOLUTIONS

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Challenges We Faced 🤯

- **Ensuring Accuracy in Financial Calculations: Financial projects require complex mathematical models and precision.**
- **AI Evolution & Rapid Changes: Technologies like RAG (Retrieval-Augmented Generation) and Agentic workflows evolve frequently, making stability a challenge.**
- **Achieving User Satisfaction: Users expect highly relevant and customized investment recommendations that align with their financial ideology.**

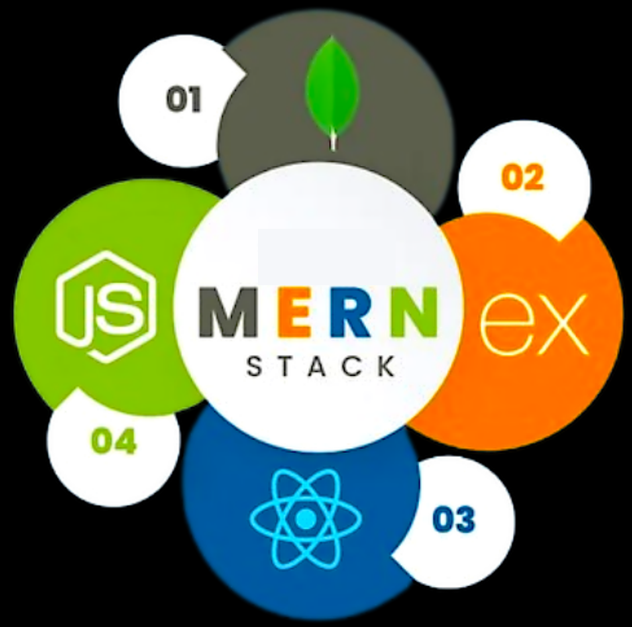
How We Overcame Them 💡

- **Regular AI Model Updates**: We monitored **module changes and ensured stability** in integration.
- **Custom Algorithm Development**: Built **in-house AI models** to enhance **accuracy and personalization**.
- **Continuous Optimization**: **User feedback loops** and **iterative improvements** ensured better recommendations.

TECHNOLOGY

Technology Stack ⚙️ :

- **Full-Stack Web Development 🖥️ :**
  - Built using MERN (MongoDB, Express.js, React.js, Node.js).
- **AI-Driven Decision Making 🤖 :**
  - RAG-based Chatbot for financial education.
  - AI Agents for personalized stock recommendations.



Security & Authentication 🔒 :

- Google OAuth for seamless login.
- reCAPTCHA Integration to enhance security.

Virtual Investment Simulation :

- Dummy currency system for **real-time market trading without risk**.

CONCLUSIONS AND SCOPE

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Conclusion & Future Scope 🌍 :

Key Takeaways :

- WealthWise is transforming financial planning through AI-driven investment strategies & analytics.
- A risk-free stock market simulation allows users to learn, invest, and grow without real financial exposure.
- Users gain deep financial literacy, making informed investment decisions effortlessly.

Target Audience :

- Beginner Investors – Exploring the stock market for the first time.
- Amateur Investors – Looking to refine their investment strategies with AI-driven insights.
- Financial Advisors – Leveraging AI-powered tools to provide better recommendations.
- Individuals Seeking Financial Analysis – Understanding income, expenses, and investment opportunities.

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THANK YOU!