

Research Visual Summary

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Applied Research

1. Structured Summary

The research paper presents a framework for investment recommendation, where a Portfolio Manager (PM) synthesizes reports from Technical, Quantitative, and Qualitative sub-analysts to provide a definitive 1-month investment recommendation. The synthesis logic involves connecting raw multi-angle analysis to PM execution, with Technical and Quantitative analysis acting as the 'Engine' and Qualitative analysis acting as the 'Steering'. The framework also involves dynamic weighting, where weights are adjusted based on consistency and sector performance. The final portfolio construction involves selecting stocks for long and short positions based on their scores. The research paper also outlines the data sources used, including structured and unstructured data, and the tasks for the PM report, including conviction score and comprehensive thesis.

2. Key Contributions

1. Synthesis of Technical, Quantitative, and Qualitative analysis for investment recommendation
2. Dynamic weighting based on consistency and sector performance
3. Final portfolio construction based on stock scores

3. Methodology

The research paper outlines a methodology for investment recommendation, which involves the use of multiple agents, including a Sector Agent and a Macro Agent. These agents access a combination of structured and unstructured data to inform their decisions. The data sources include financial statements, such as Profit, Net Income, and Cost of Sales, as well as Balance Sheet items, such as Total Assets and Equity. The methodology also involves the use of dynamic weighting, where weights are adjusted based on consistency and sector performance. The final portfolio construction involves selecting stocks for long and short positions based on their scores.

4. Results & Findings

The research paper does not provide explicit results, but outlines the tasks for the PM report, including the conviction score and comprehensive thesis. The conviction score is a measure of the strength of the investment recommendation, ranging from 0 to 100, with 100 indicating outperformance and 0 indicating underperformance. The comprehensive thesis involves synthesizing the alignment and conflict between Technical, Fundamental, and Sector analysis, and highlighting catalysts and risks.

5. Technical Diagrams

5.1 System Architecture

[Diagram rendered in web interface]

5.2 Methodology Flowchart

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5.3 Research Pipeline

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5.4 Data Flow Diagram

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