WiseBucks.AI

Introducing The Team

Advisors:

- Professor Eugenio: Interim Head of Institute of Physical AI at Purdue
- Sankalp Krishnan: Quantitative Trader at Quantitative Strategies Group LLC

Team:

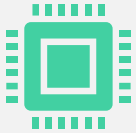
- Disha Maheshwari: Product Architect, ML and Operations
- Rishi Mantri: Machine Learning Engineer
- Atharva Thakur: Machine Learning Engineer
- Anuj Thakkar: Machine Learning Engineer
- Ansh Tandon: Machine Learning Engineer
- Joie Young: Front End Developer
- Vijay Vittal: Full Stack Developer
- Vraj Patel: Full Stack Developer
- Somansh Shah: Back End Developer and Operations

Affiliations: College of Engineering, Department of Computer Science, Daniel School of Business

Problems faced by retail investors:

Lack of Financial Education:

Around 66% of retail investors lack basic financial literacy



Sea of Information:

Over 76% of investors feel overwhelmed by the sheer volume of financial information

Initial Loss in Investments:

Nearly 90% of new retail investors face losses in the first year of investing

Solution: WiseBucks.AI

WiseBucks.ai assistant for financial education:
> Informs on investment choices
> Demystifies financial concepts
> Offers tailored educational content

Proprietary AI models:
> Tailored investment strategies
> Data-driven decision-making
> Predictive analytics opportunities & risks

Gamified reward-based investing:
> Encourages incentivized trading
> Leaderboard-based rewards system
> Compete and earn points with friends

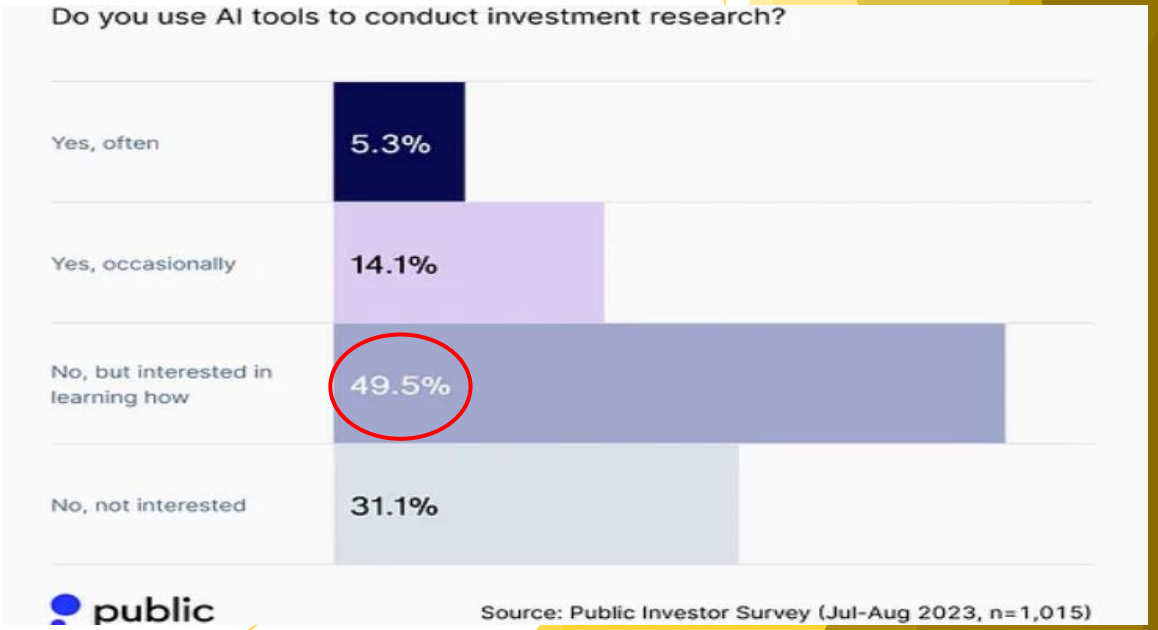
Virtual(paper) trading platform:
> Simulates real-market experience
> Eases transition to investing
> Risk-free trading practice

Market Opportunity

30 million new retail investors in the last 2 years.

% of traded shares from retail investors **nearly doubled** from 2011 to 2021.

Future of retail investment space is being captured by AI tools:



Market Gap

Market for Investment Education

Market for Retail Investing

BEAR BULL TRADERS

SIMPLER TRADING

WARRIOR TRADING

51% of Americans need more **investing education** to get started

Wisebucks.AI

30+ million began their investing journey in 2020

Robinhood

M1 Finance

Betterment

market gap

Business Model / Path to $1B

Free version

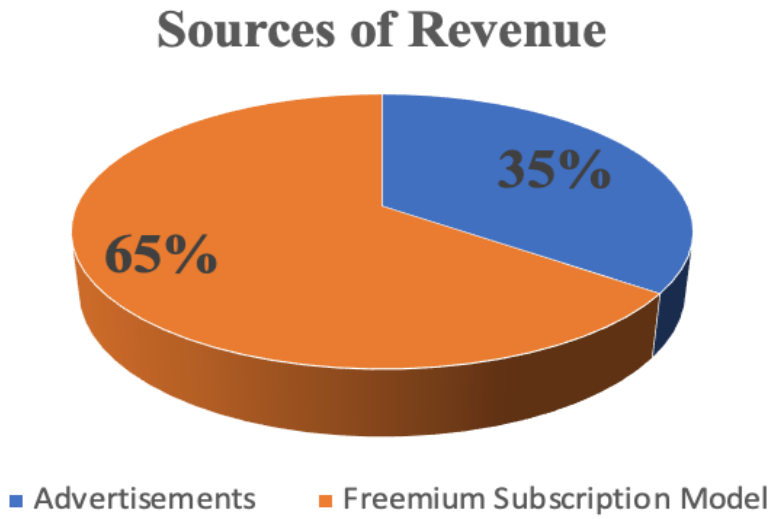
1) Limited news sentiment & stock predictions

2) Access to paper (virtual) trading

Paid version

1) Advanced AI analysis (all SP500 stocks)

2) AI portfolio generation (rebalancing)



Market Size

16M

*considering target market estimates

$5

fee / per month

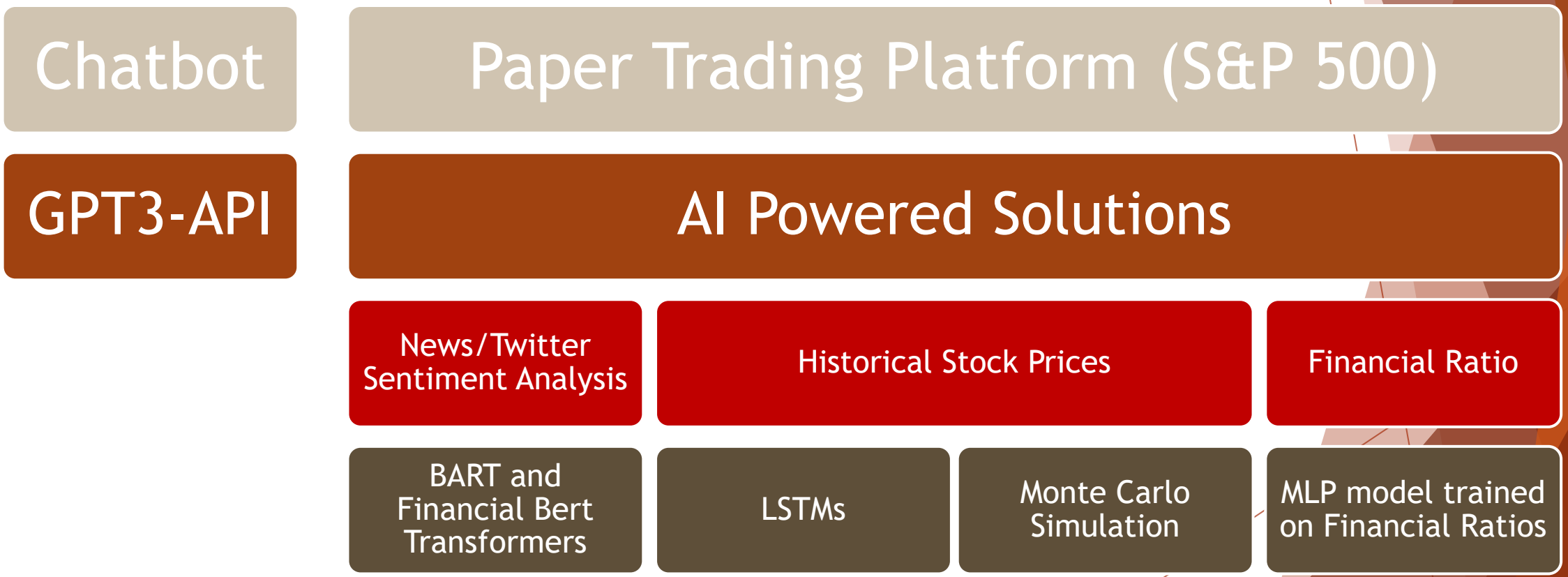
*25% lesser fee than market average

~$1B

Annual net revenue

*without consideration of advertisements revenue

Our proprietary Top-Down Model of Product Architecture



WiseWealth: Front End UI

WISEBUCKS.AI

Hello, Sally Norman

WISEWEALTH

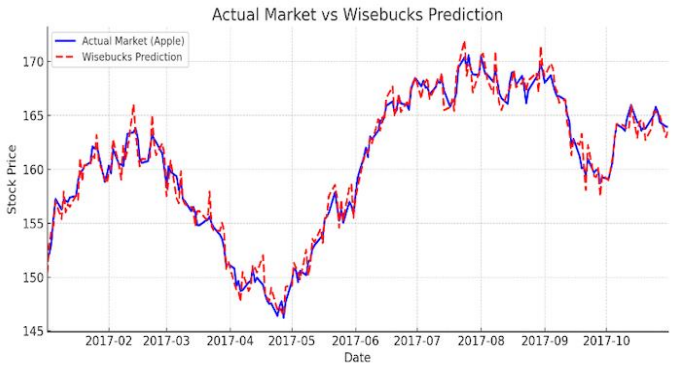
FEATURES

- Dashboard
- Investment challenge
- Paper Trading
- WiseWealth

DOCUMENTATION

- Tutorials

LAUNCH CHATBOT



Positive Sentiment (9.8/10)
"NVIDIA (NASDAQ: NVDA) reported a record revenue of $18.12 billion for the third quarter, up 206% from a year ago and up 34% from the previous quarter."

Negative Sentiment (2.2/10)
"US FDA flags a new problem with Philips machines, causing shares to fall".

Positive Sentiment (7.5/10)
"GM surges after stock buyback, dividend announcement": Wall Street's top analyst calls".

Why buy AAPL for the next 3 months:

Given your current portfolio, investing in Apple Inc. (AAPL) in the upcoming quarter is promising, driven by positive news sentiment from its innovative product launches, strong fundamentals with a recent reported revenue of over $83 billion, and a historical pattern of stock resilience. AAPL has consistently shown robust growth, with its stock price often outperforming market expectations and swiftly recovering from downturns, indicating a solid investment choice.

Stock Predictions:

AAPL: 📈 Sentiment 8.8/10; 💰 Q3 Rev >$83B; 📊 historical trend ↑; 🟢 Buy Signal

TSLA: 📉 Sentiment 2.2/10; 💰 Q3 Rev $23.35B (↓ from Q2); 📊 Stock -20% since July; 🔴 Sell Signal.

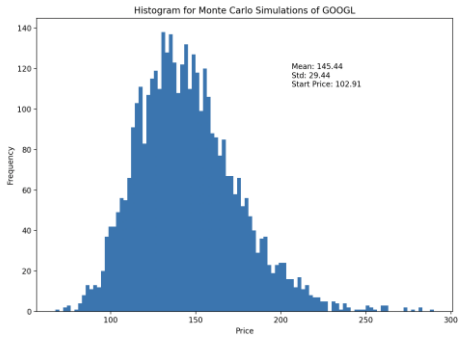
AMZN: 📉 Sentiment 4.8/10; 💰 Q3 Rev 143.1B; 📊 historical trend ↑; 🟢 Buy Signal

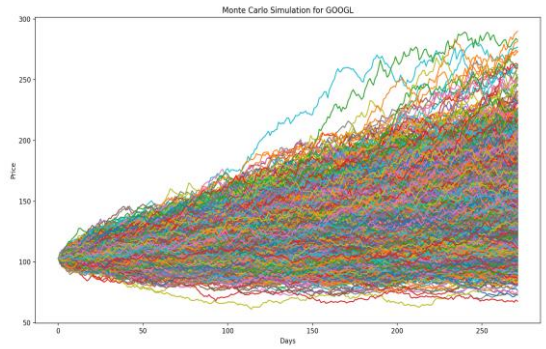
WiseWealth: Backend AI Model Outputs

WISEWEALTH

Monte Carlo Analysis

GOOGL: 10/16/23: **Predicted Price : $139.10**, Actual Price: **$138.44**





Sentiment Analysis

0 - 100% : Negative - Positive

Multiple Factors Contributed to Alphabet's (GOOG) Outperformance in Q3

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Average sentiment: 94.89999999999999%
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Google: All Good Things Must Come To An End (Rating Downgrade)

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Average sentiment: 35.3%
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Financial Ratios

- Fundamental Analysis (long-term).

Ticker	Price	MCap	PE	EPS	Earnings_	Div_Yield	Volume	Score
AZO	2671.77	47.399B	20.33	132.25	6.505	-1	134079	322.5182
AN	133.4	5.742B	5.77	23.4	4.055	-1	513461	200.7769
AAPL	191.31	2.955T	30.94	6.14	0.198	0.51	58056328	127.5427
AMD	122.51	197.592B	1111.91	0.11	0	-1	53877246	104.7545

LSTMs

- Employed TensorFlow (Keras) trained model
- Predicted Closing price: $134.19

GOOG Close Price Prediction for Tomorrow

Today's Date: 11-08-2023

Close Price: 133.26

Volume: 15077400

Open Price: 132.36

High Price: 133.54

Low Price: 132.16

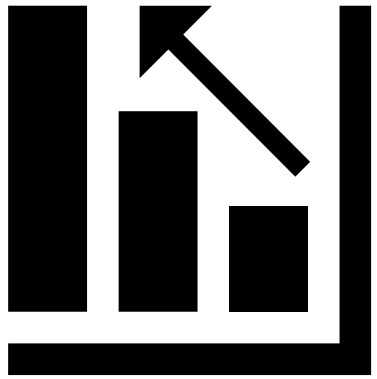
Predicted Close Price for 11-09-2023: 134.19

Next Steps

1) **Beta testing proof of concept** (feedback loops using agile methodology)

2) **Improving AI model accuracy** (cleaner & more effective datasets)

3) **Building a niche community of budding retail investors** (high school / college grads)



Thank You