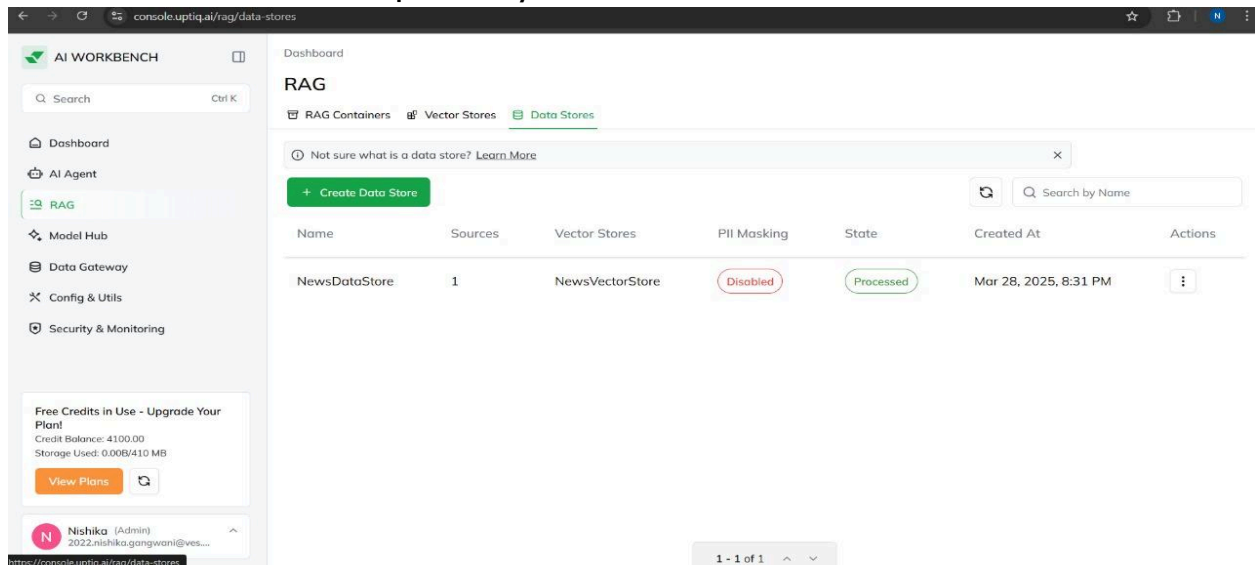


# InvestWise AI : Intelligent Wealth Creation Platform

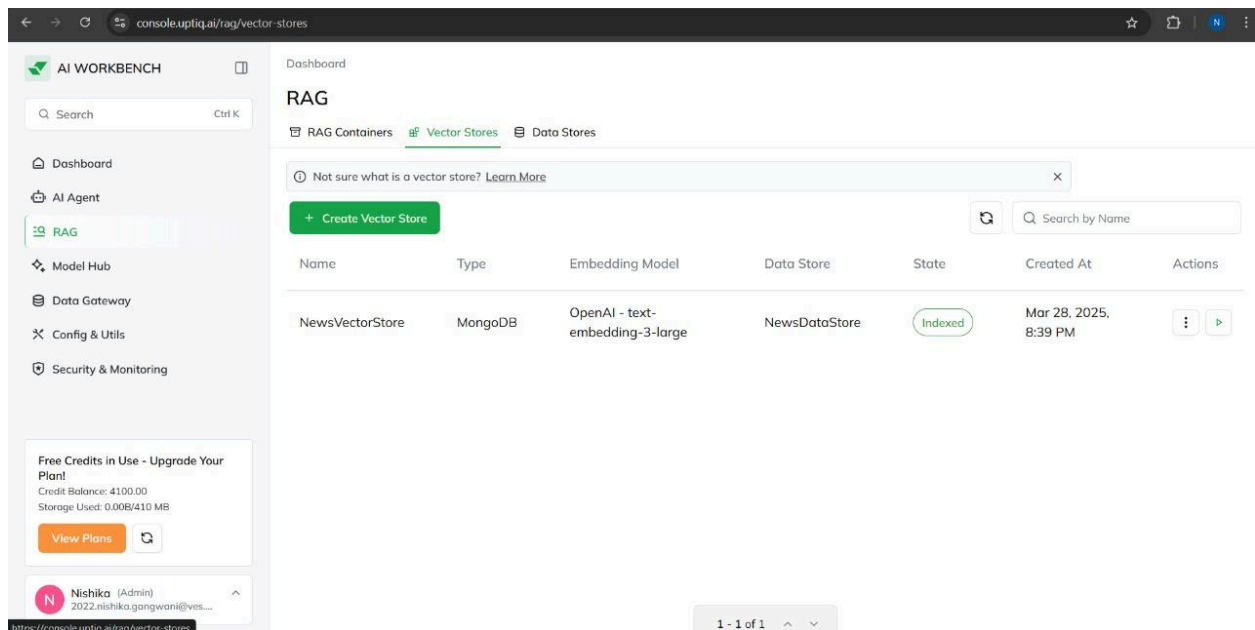
## 1. Sentiment Analysis:

### Steps:

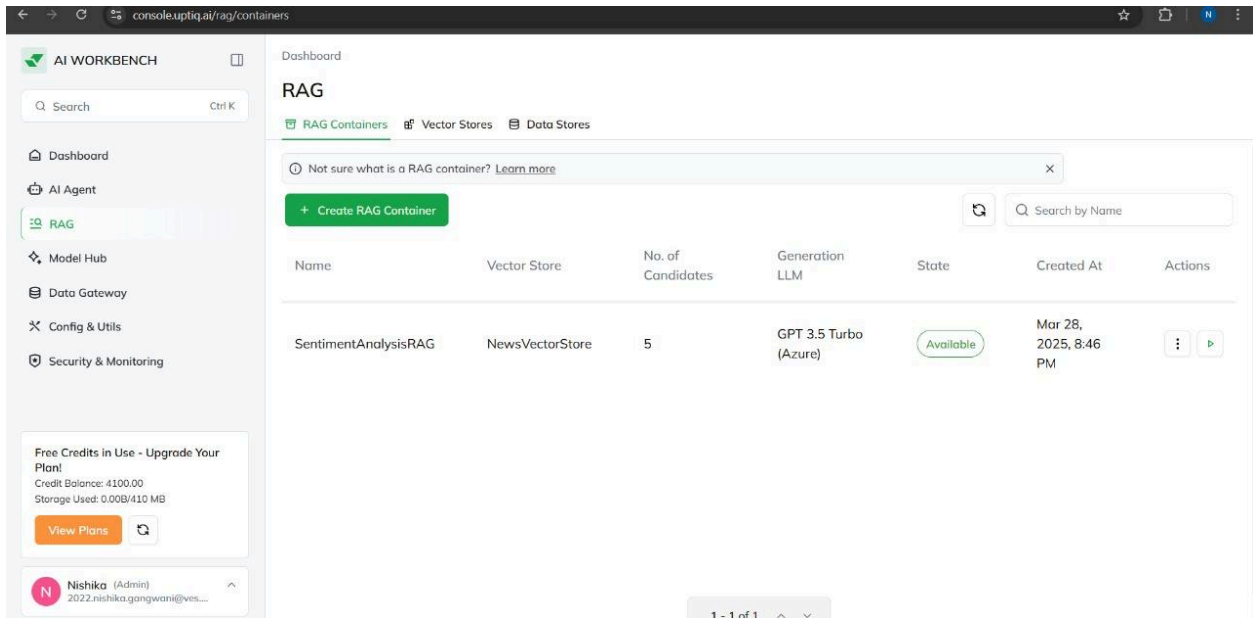
- 1) Created a API key in NewsAPI.
- 2) Ran a Python Code and got a JSON file which we then converted to CSV due to some incompatibility issues.



- 3) Then we created Data sources after that created vector store and after that we made a RAG Container.



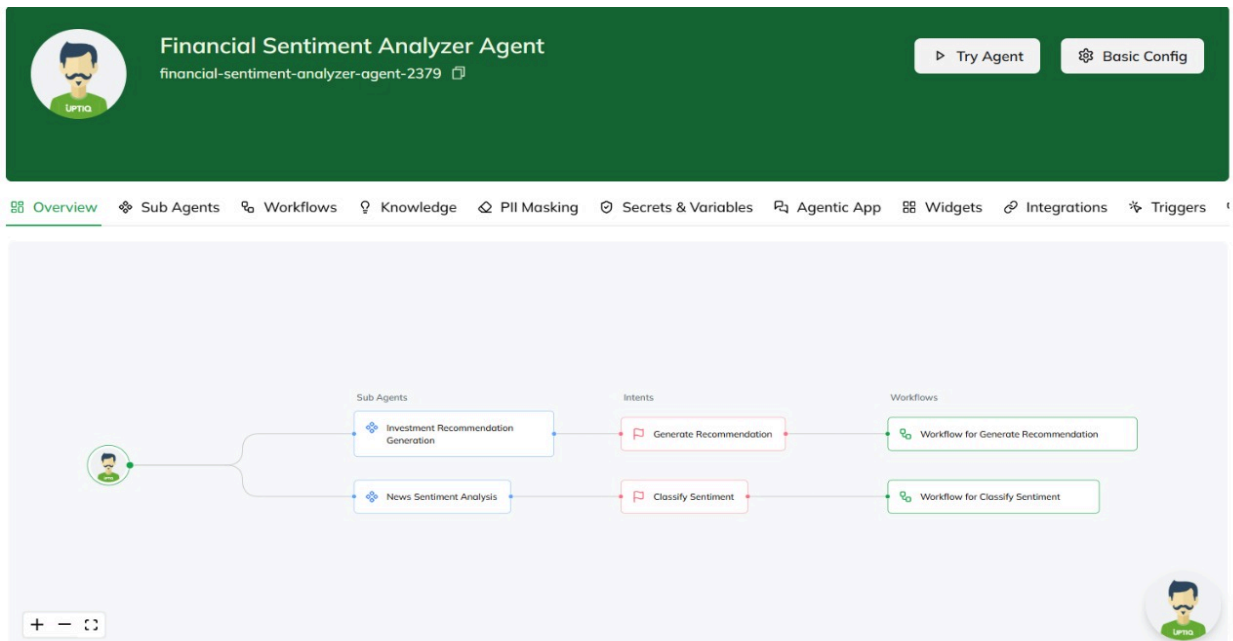
3) We choose the LLM model as GPT-3.5 Turbo Azure.



The screenshot shows the AI Workbench interface for RAG containers. The left sidebar contains navigation links: Dashboard, AI Agent, RAG, Model Hub, Data Gateway, Config & Utils, and Security & Monitoring. The main area displays a table of RAG containers. A 'Create RAG Container' button is at the top left, and a search bar is at the top right. The table has columns for Name, Vector Store, No. of Candidates, Generation LLM, State, Created At, and Actions. One container is listed: SentimentAnalysisRAG, using NewsVectorStore, with 5 candidates, GPT 3.5 Turbo (Azure) as the LLM, and an 'Available' state. A notification banner at the bottom indicates 'Free Credits in Use - Upgrade Your Plan!' with a credit balance of 4100.00 and storage used of 0.00B/410 MB.

Name	Vector Store	No. of Candidates	Generation LLM	State	Created At	Actions
SentimentAnalysisRAG	NewsVectorStore	5	GPT 3.5 Turbo (Azure)	Available	Mar 28, 2025, 8:46 PM	

4) Then the model was working fine with the queries it was tried on.



RAG Playground

GPT 3.5 Turbo (Azure)  
An economical model designed for speed and simple tasks.

SentimentAnalysisRAG

Filter Config

Retrieve the top 5 news articles about AAPL and provide a summary of their content.

Based on 5 sources

I can provide summaries of the top 5 news articles about AAPL based on the information available in the dataset. Here are the summaries:

1. Article 1:

- Title: CIBC World Market Inc. Acquires 117,592 Shares of Apple Inc.
- Description: CIBC World Market Inc. increased its holdings in Apple Inc. by 2.8% in the fourth quarter. The institutional investor acquired 117,592 shares of Apple Inc. This acquisition shows a positive sentiment towards the company's stock.

2. Article 2:

- Title: FSA Investment Group LLC Invests \$495,000 in Apple Inc.
- Description: FSA Investment Group LLC invested \$495,000 in Apple Inc. during the 4th quarter, acquiring 2,173 shares of the company's stock. This

Enter query Send

GPT 3.5 Turbo (Azure)  
An economical model designed for speed and simple tasks.

SentimentAnalysisRAG

Filter Config

Retrieve the top 5 news articles about TSLA and provide a summary of their content.

Based on 5 sources

I will provide summaries of the available news articles about TSLA from the dataset:

1. Article 1:

- Title: Best Electric Vehicle Stocks To Add to Your Watchlist – March 25th
- Description: MarketBeat's stock screener tool recommends seven Electric Vehicle stocks to watch, including Tesla, Shell, Baidu, Rivian Automotive, XPeng, Vale, and NIO. These stocks represent companies in the electric vehicle industry and are highlighted for potential investor consideration.

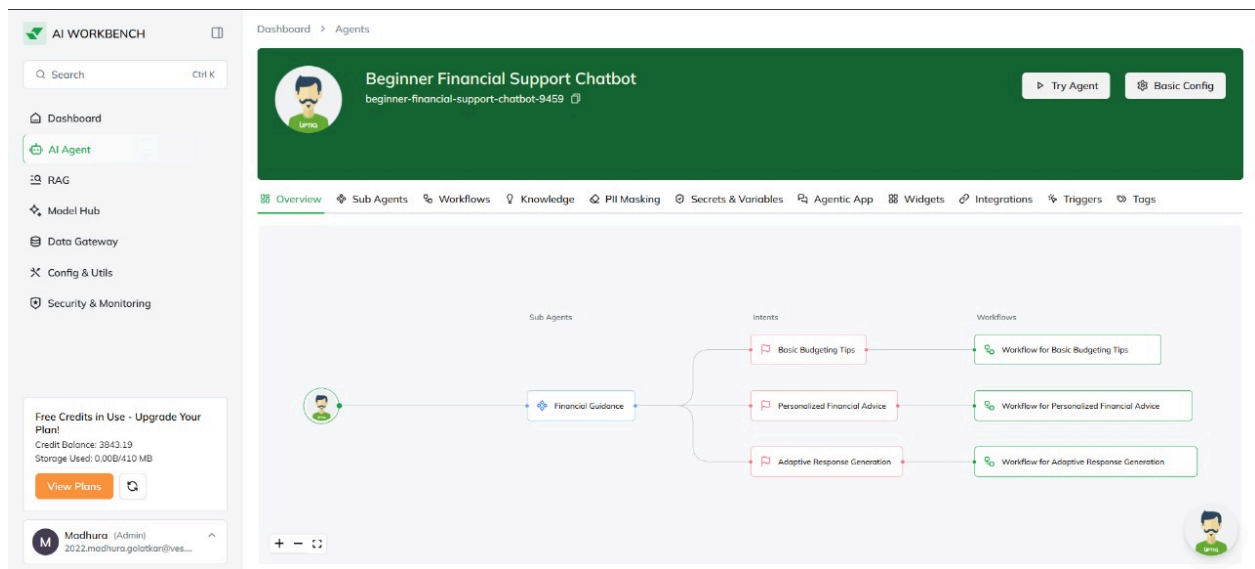
2. Article 2:

- Title: Tesla, Inc. (TSLA) Deliveries Fall Short, But Morgan Stanley Says It's Still an AI Winner
- Description: Despite falling short on deliveries, Tesla, Inc. (TSLA) is noted to be a winner in the field of AI. The article provides insights into Tesla's position and performance as an AI leader, potentially influencing investor sentiment.

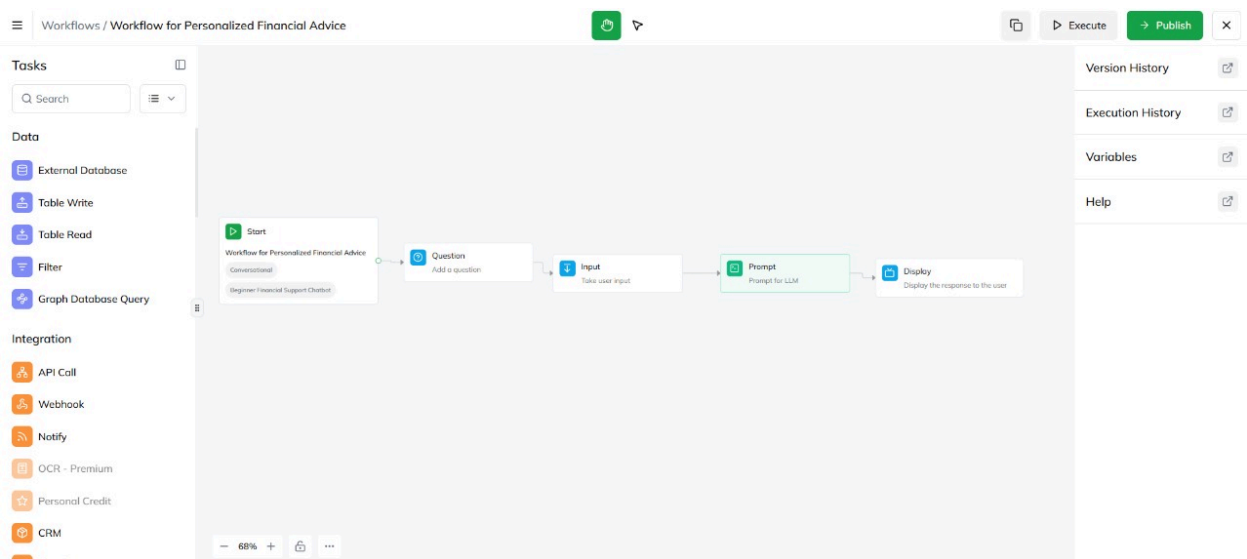
Enter query Send

## 2. Beginner Support ChatBot

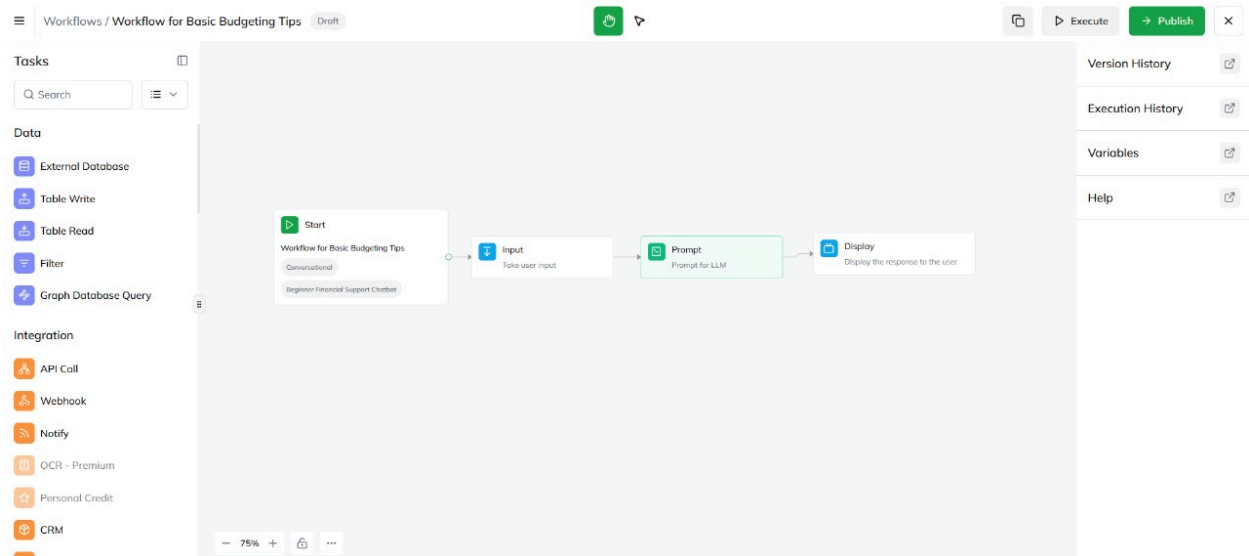
The "Beginner Financial Support Chatbot" assists users with financial management by providing basic budgeting tips and personalized financial advice. It uses a conversational workflow to capture user queries (e.g., "How do I budget?" or user provides monthly income, expenses, saving and on that basis agent suggests further investment decisions), processes them through an LLM to generate simple, actionable advice, and displays the response in a user-friendly manner. The chatbot focuses on beginner-friendly guidance, covering budgeting, saving, and money management while adapting to 2025 economic trends like inflation. It aims to empower users with clear, step-by-step financial tips tailored to their needs.



## Workflow for personalized financial advice:

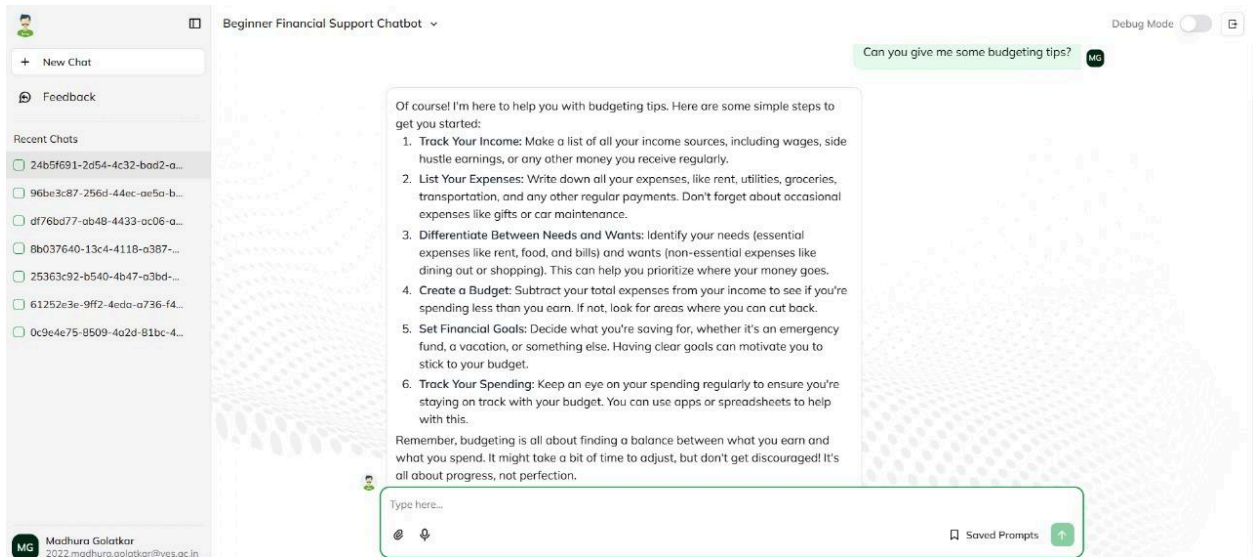


## Workflow for Basic Budgeting Tips:

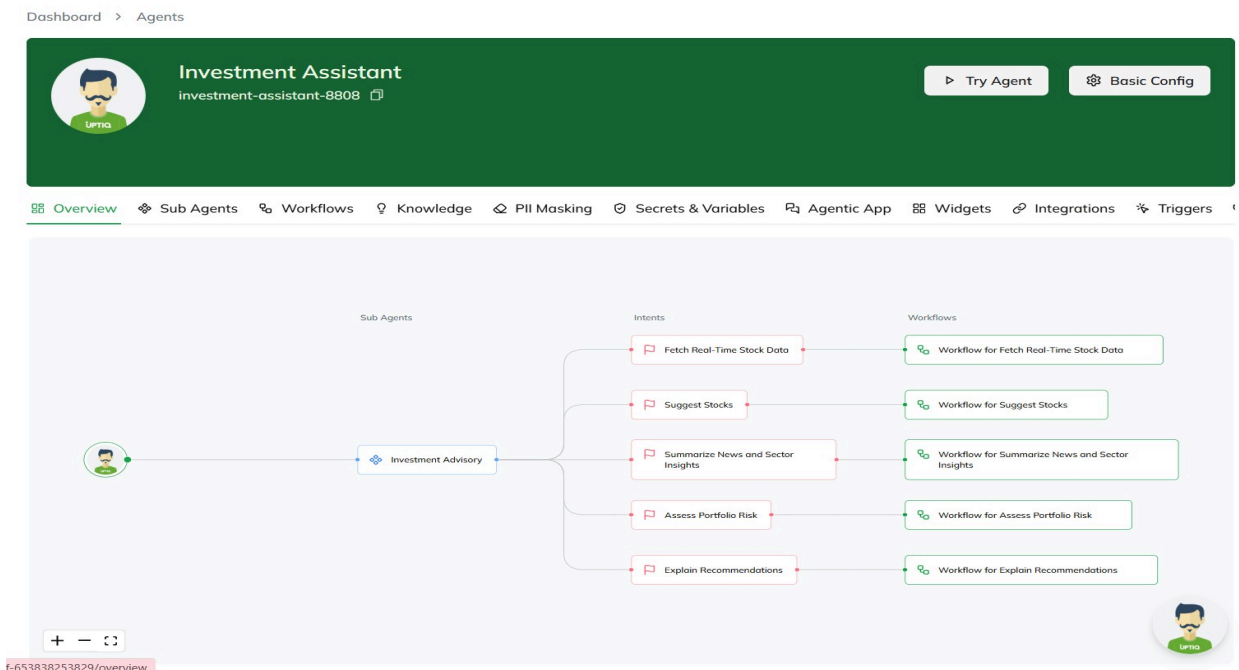


## Chatbot responses:

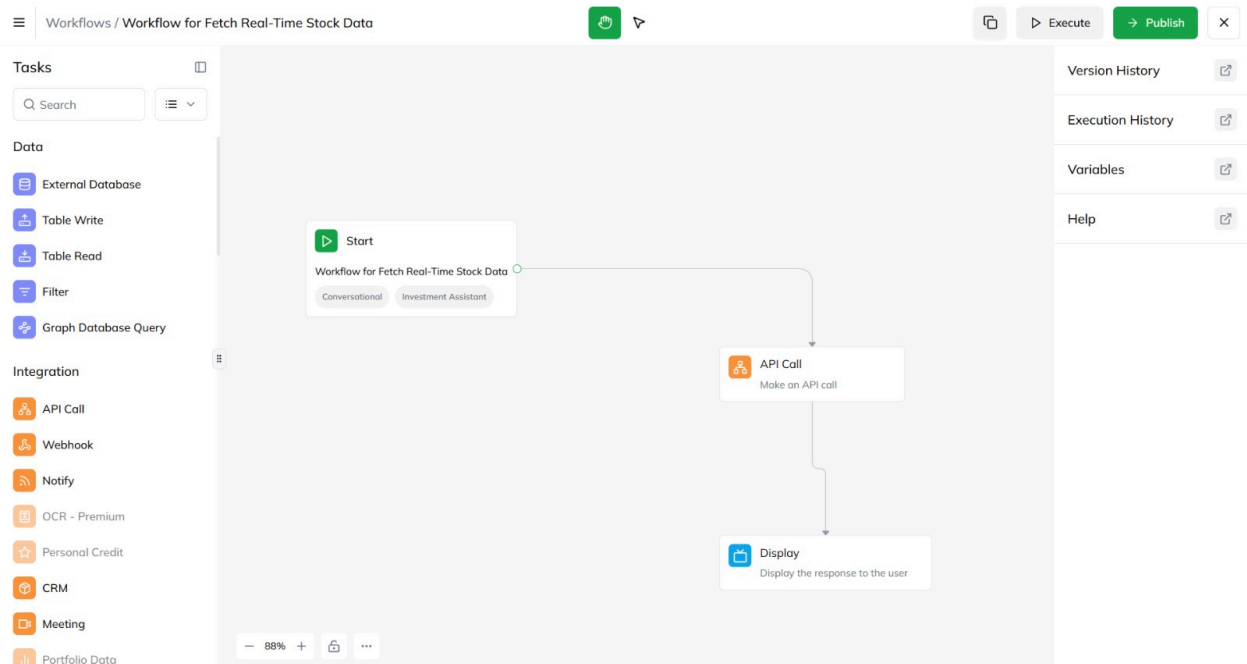
The screenshot shows a chatbot interface for 'Beginner Financial Support Chatbot'. On the left, there's a sidebar with 'New Chat', 'Feedback', and 'Recent Chats'. The main chat area shows a conversation with a user. The user's message is: 'My monthly income is \$3000, basic expenses is \$500 and savings I do \$5 and I have high risk tolerance'. The chatbot's response is: 'To effectively budget with a monthly income of \$3000, consider implementing the following strategies: 1. Establish Essential Expenses: Allocate approximately 50% of your income (\$1500) towards essential expenses, including housing, utilities, groceries, and transportation. 2. Set Aside Savings: Aim to save at least 20% of your income (\$600) for future needs, emergencies, or investments. 3. Discretionary Spending: Limit your discretionary expenses (like entertainment, dining out, and hobbies) to around 30% of your income (\$900). This will allow you to enjoy some leisure while staying within your budget. 4. Track Spending: Regularly monitor your spending to ensure you remain within these categories and adjust as necessary. 5. Review and Adjust: At the end of each month, assess your spending habits and make adjustments to future budgets to improve financial health. By following this structured approach, you can effectively manage your income and work towards your financial goals.' The chatbot's name is 'Madhura Galatkar' and the email is '2022.madhura.galatkar@ves.ac.in'. There's a 'Debug Mode' toggle and a 'Saved Prompts' button.



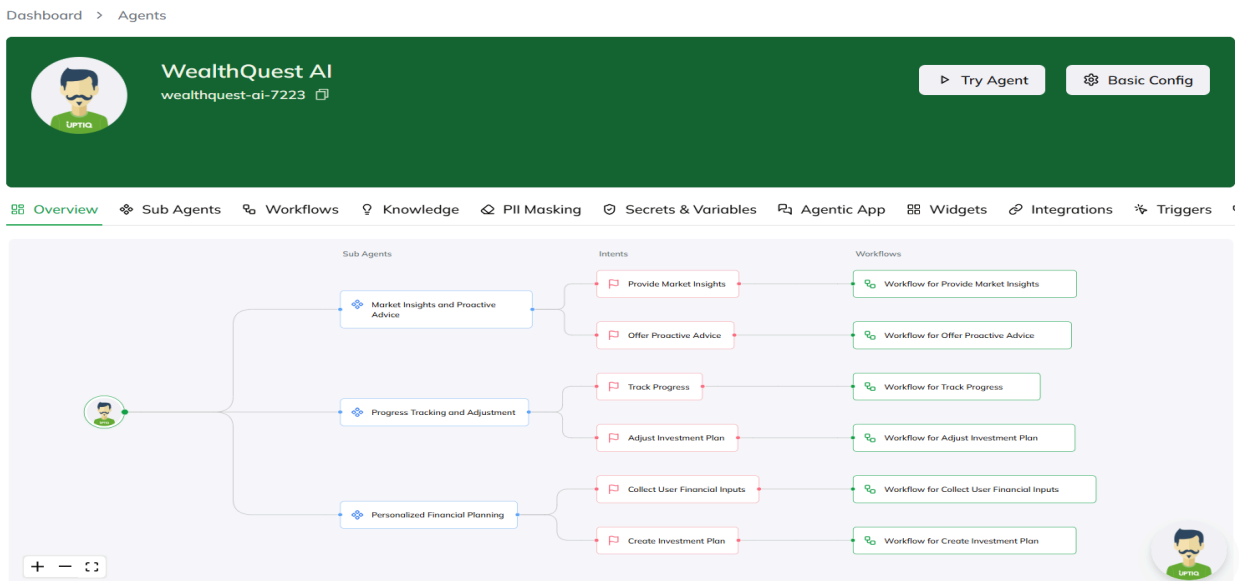
### 3. Implementation of AI Powered Investment Analysis



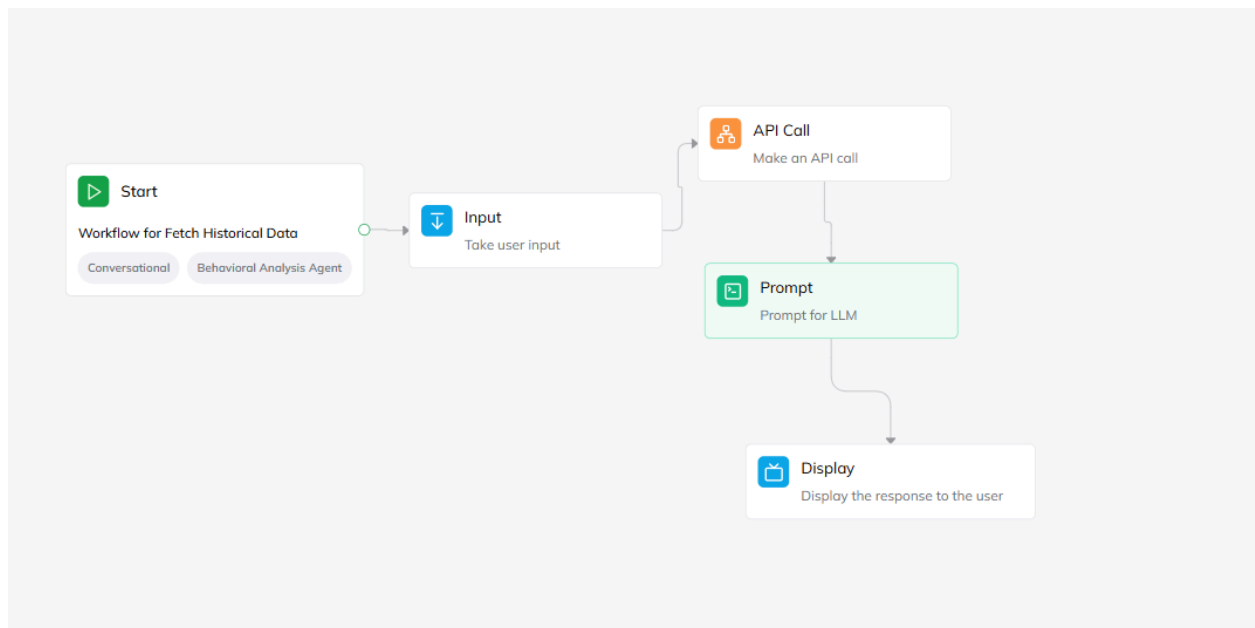
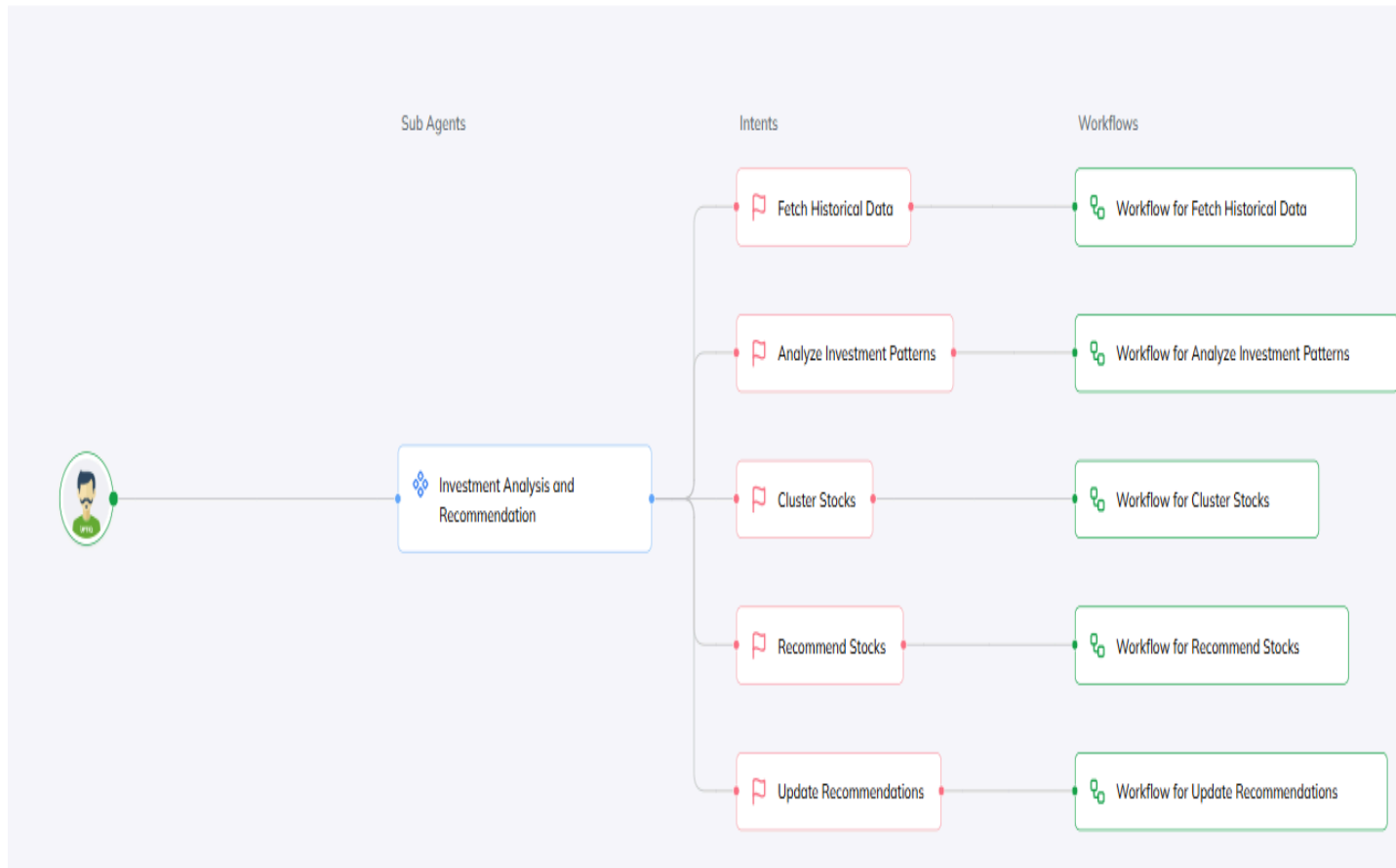
## Workflow for fetching real time stock data:



## 4. Implementation of Goal Based investment Planning



## 5. Implementation of Behavioral analysis





# Chatbot Responses

Behavioral Analysis Agent

Debug Mode

im interested in the current stock price, recent news, financial analysis for Apple Inc

Thank you for your interest in information about Apple Inc.! To better assist you, could you please specify what specific aspects you're looking for? For example, are you interested in the latest stock price at this moment, the most recent news articles, or a detailed financial analysis report? Additionally, if you have a timeframe in mind for the news or analysis (such as the last week or month), that would be helpful as well. Your clarification will help me provide you with the most relevant information.

i want the latest price

i want the latest price for aapl

```
{ "Global Quote": { "01. symbol": "AAPL", "02. open": "221.6700", "03. high": "223.8100", "04. low": "217.6800", "05. price": "217.9000", "06. volume": "39818617", "07. latest trading day": "2025-03-28", "08. previous close": "223.8500", "09. change": "-5.9500", "10. change percent": "-2.6580%" } }
```

Fetch sector information FOR AAPL

im interested in the current stock price, recent news, financial analysis for Apple Inc

As of my last update, Apple Inc. (AAPL) operates in the Technology sector. The company is known for its electronic devices, software applications, and online services. The Technology sector encompasses companies that are involved in the research, development, and distribution of technological products and services. Apple Inc., in particular, is a leading player in the global technology industry and is known for its innovative products such as the iPhone, iPad, Mac computers, and Apple Watch, as well as its services like the App Store, iCloud, Apple Music, and more.

If you have any specific questions, or if you would like more detailed information on how Apple Inc. fits within the Technology sector, please let me know!