



CODECELL-CMPN,VESIT

SYRUS HACKATHON 2025

Category Code: C5

Problem Statement Title: AI-Powered Investment & Trading Assistant

Team Name: T-bits

Institute Name: Vivekanand Education Society's Institute of Technology



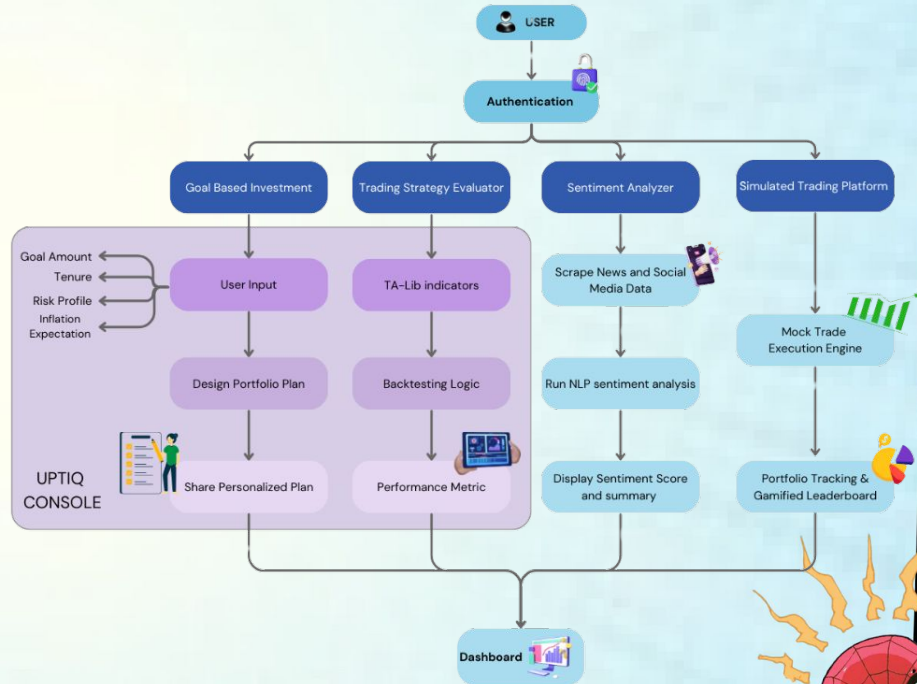
Idea / Approach details (& implemented features)

Problem Statement

- Retail investors lack personalized guidance and real-time insights.
- Evaluating strategies and analyzing sentiment requires expertise, leading to poor decisions.

Solution

- AI-powered assistant integrates goal-based planning, strategy evaluation, sentiment analysis, and simulated trading.
- Uses UPTIQ Console to automate financial decisions and provide personalized recommendations.



Innovation (Showstopper)/ Use Case Diagram

Goal-Based Investment Planning

- Recommends portfolios based on goals and risk.
- Uses historical data and growth models.

Market Sentiment Analyzer

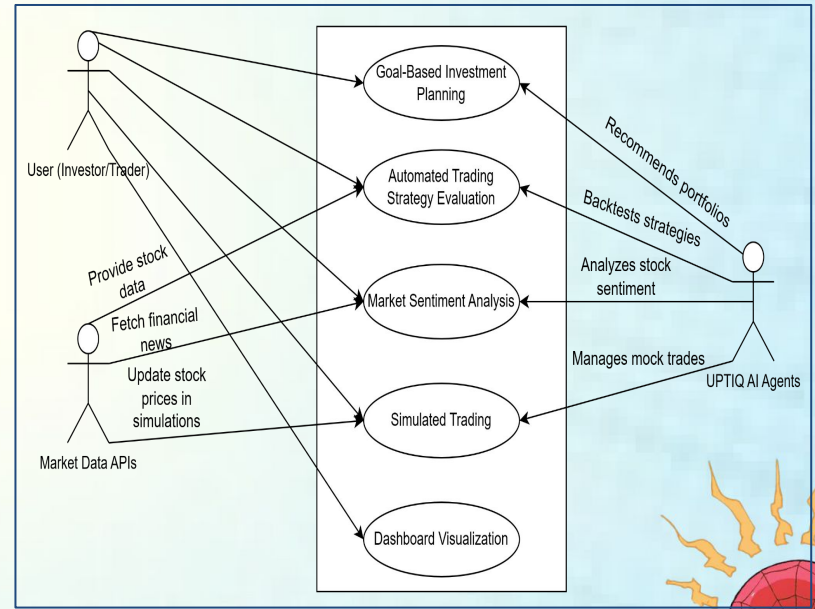
- Analyzes sentiment from news and social media.
- Guides informed investment decisions.

Trading Strategy Evaluator

- Tests indicators on historical data.
- Provides key performance metrics.

Simulated Trading Platform

- Allows mock trades and tracks performance.
- Encourages learning through gamification.



Tech Stack

Database



Frontend



Backend



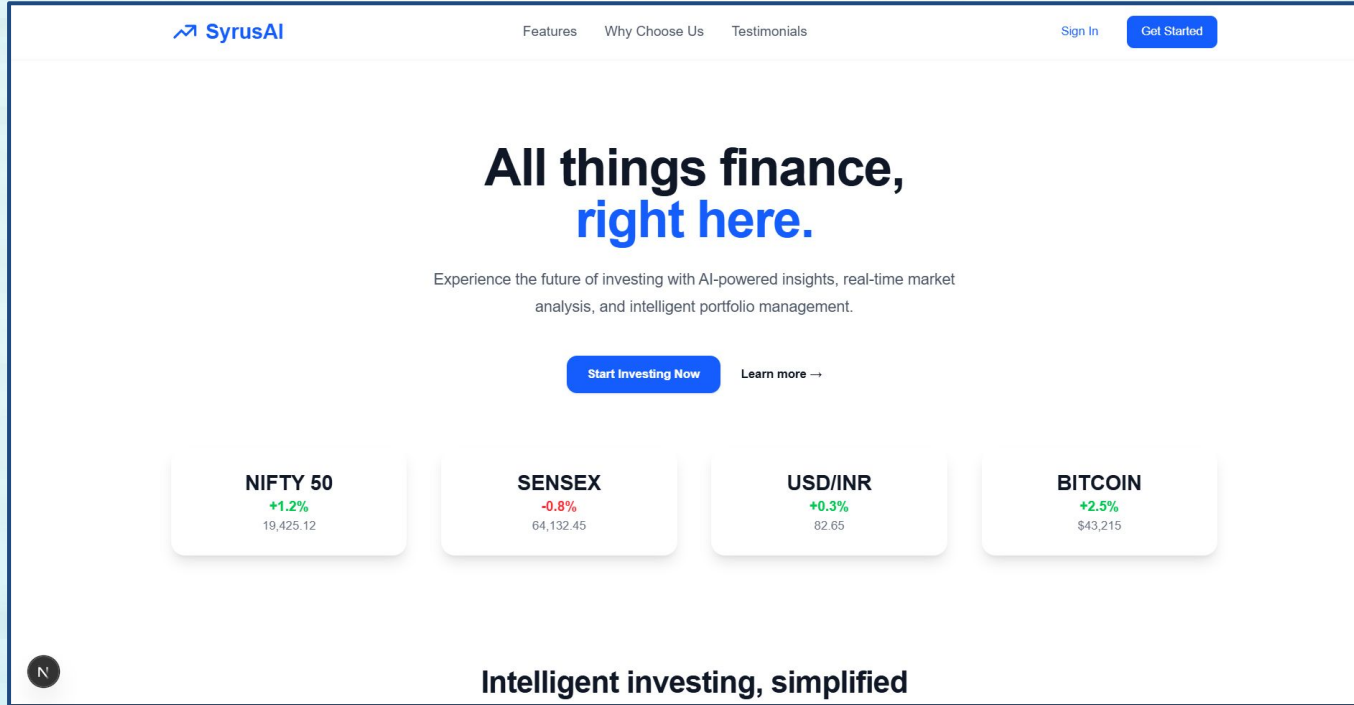
Agentic Workflow



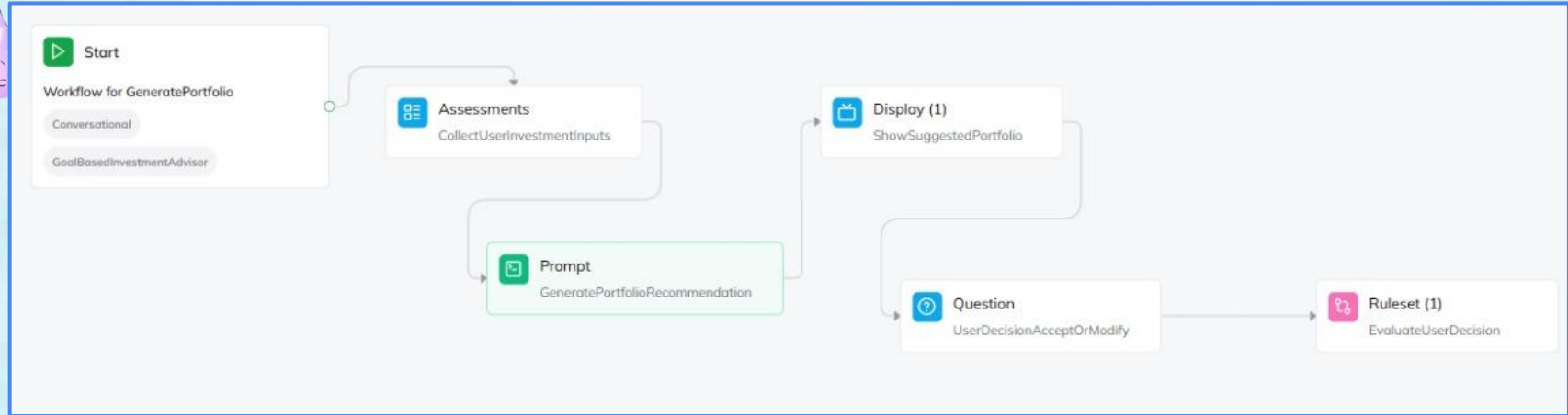
Data resources



Implementation/Prototype/Use Case Diagram (screenshots)



In case of Uptiq category - Your Uptiq Agent (explain in detail)



User Input: Goal, amount, duration, and risk.

AI Recommendation: Asset allocation with future value.

User Choice: Accept or modify.

Confirmation: Confirms or stores portfolio.

Modification: AI re-evaluates custom allocation.

Final Confirmation: Displays and confirms updated portfolio.



Future Objectives

- **Improve AI Accuracy** – Integrate deep learning to detect patterns, e.g., **Tesla stock surging after earnings reports**, for better predictions.
- **Multi-Asset Support** – Expand analysis to **crypto (Bitcoin trends)**, **ETFs (S&P 500)**, and **commodities (Gold price shifts)** for diversified insights.
- **Real-Time Risk Alerts** – AI detects sudden **Nvidia stock drops (e.g., 5% in pre-market)** and alerts users instantly.
- **Personalized Strategies** – AI adapts; e.g., if a user prefers **low-risk dividend stocks**, it suggests **Coca-Cola over Tesla**.

