



CODECELL-CMPN, VESIT

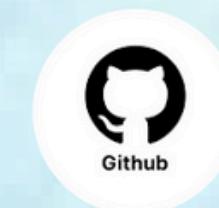
SYRHS HACKATHON 2025

Category Code: C2

Problem Statement Title: Wealth and Asset Management

Team Name: The Polymorphs

Institute Name: Vivekanand Education Society's Institute of Technology



Idea / Approach details (& implemented features)

FinWise AI uses AI Agent as the core intelligence to assist users in managing investments. It integrates **multiple sub-agents**, **retrieval-augmented generation (RAG)**, and **UPTIQ API resources** to generate insights for investment strategies. The key objectives include:

Automated Recommendations

Provides personalized investment suggestions based on risk tolerance

Portfolio Rebalancing

Adjusts asset allocation to maintain optimal returns with minimal risk

Goal-Based Planning

Aligns investments with short-term and long-term financial goals

Market Event Analysis

Monitors global events for real-time portfolio adjustments



Innovation (Showstopper)



AI-Powered Voice-Driven Investment Assistant

Unlike traditional investment platforms, users can speak naturally to the AI, and it responds with real-time financial insights, recommendations, and portfolio updates.

AI-Driven Risk-Aware Investment Strategies with Advanced Metrics

Users receive tailored investment strategies using AI-driven risk metrics (Sharpe Ratio, Beta, Monte Carlo simulations).

AI-Powered Goal-Based Investment Planning

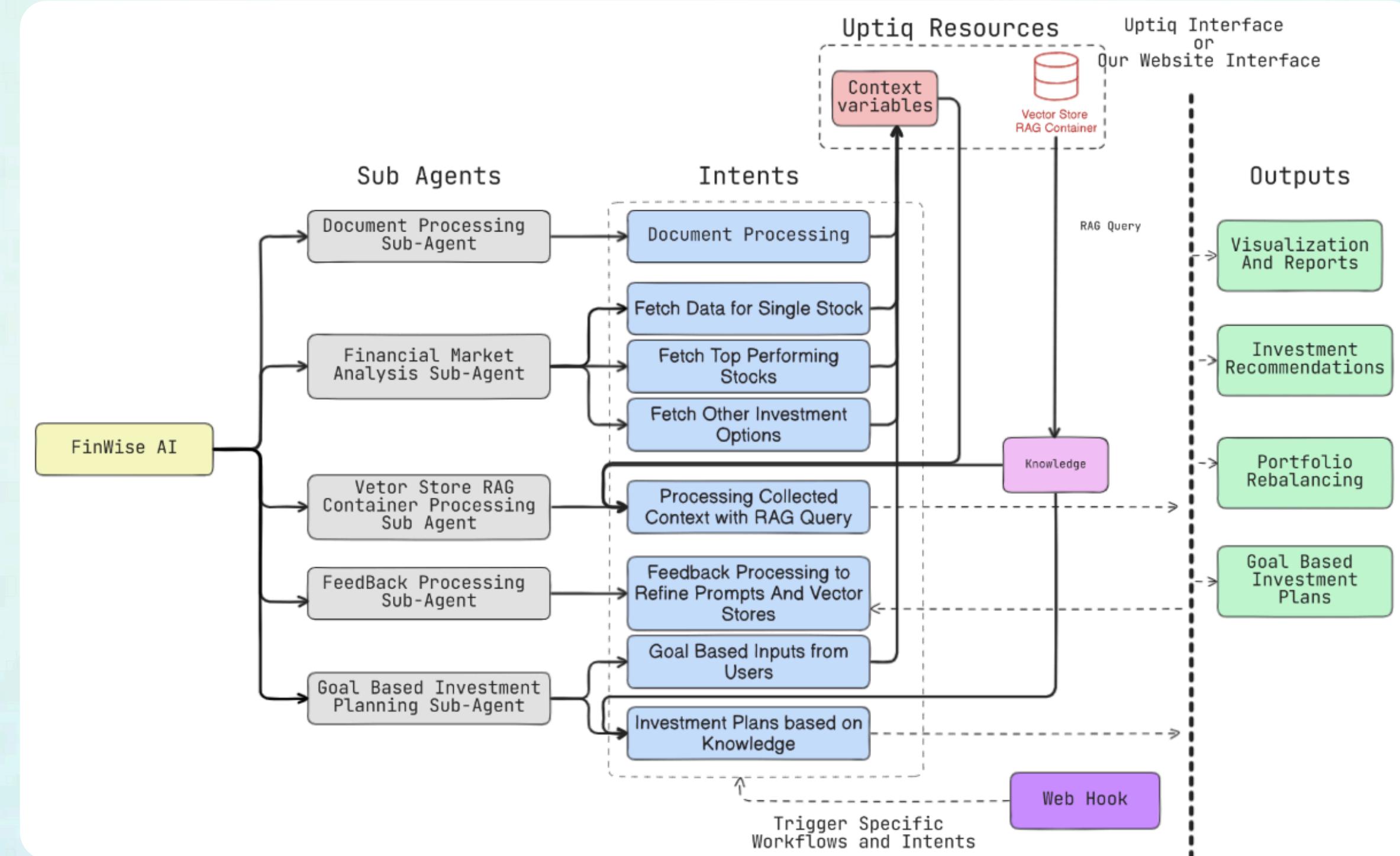
Users specify their target return amount and investment duration. AI dynamically calculates the optimal monthly investment required.

AI-Driven Portfolio Rebalancing with Risk Adaptive Strategies

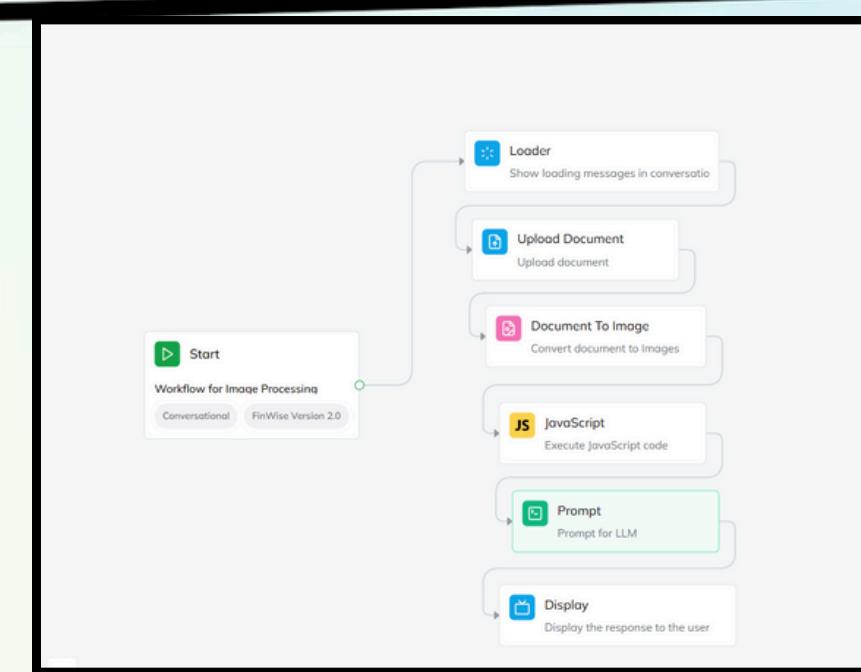
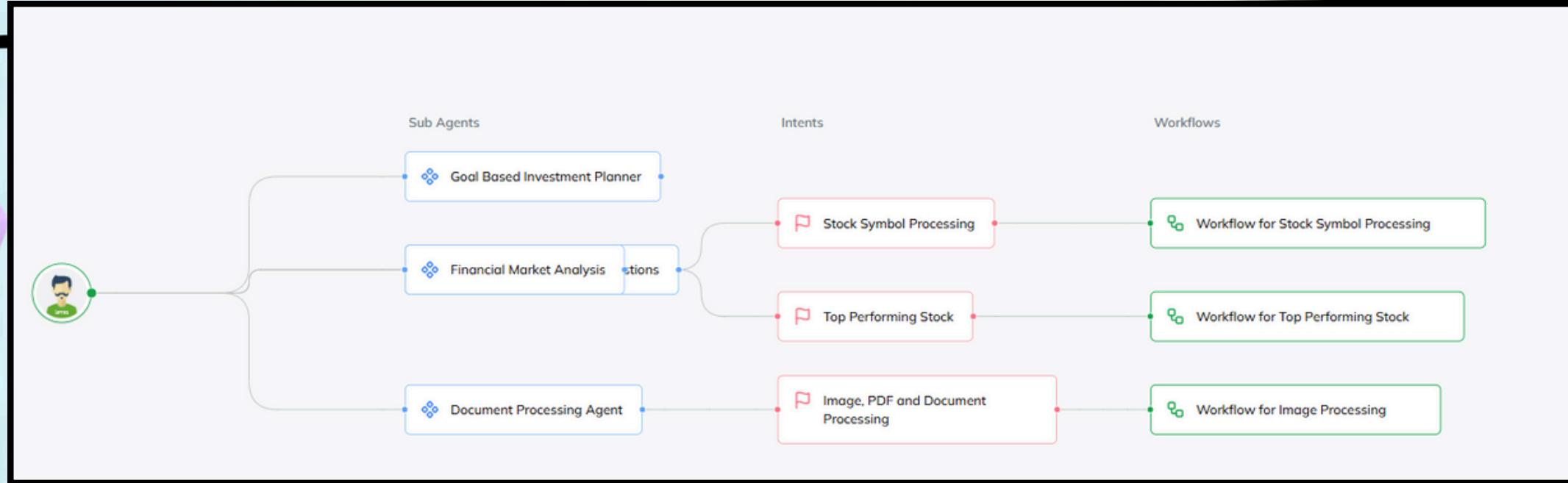
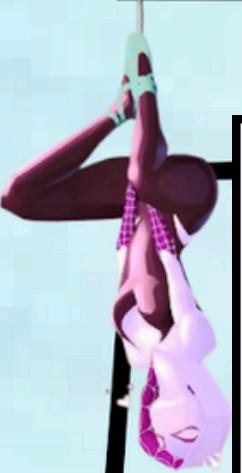
Instead of static diversification, AI dynamically shifts investments in response to Market crashes, Inflation risks, Interest rate fluctuations, Sector shifts



Block Diagram



Implementation



FinWise

Revolutionize Your Investment Strategy

Smart Investing, Simplified Experience

Discover a modern approach to investing with our cutting-edge platform. Intelligent insights, zero complexity.

[Start Investing](#) [Learn More](#)

2M+ Total Users **₹50,000 Cr** Assets Under Management

A central graphic shows a person interacting with a bar chart and a dollar sign.

Investment Opportunities

Explore a diverse range of investment avenues tailored to your financial goals

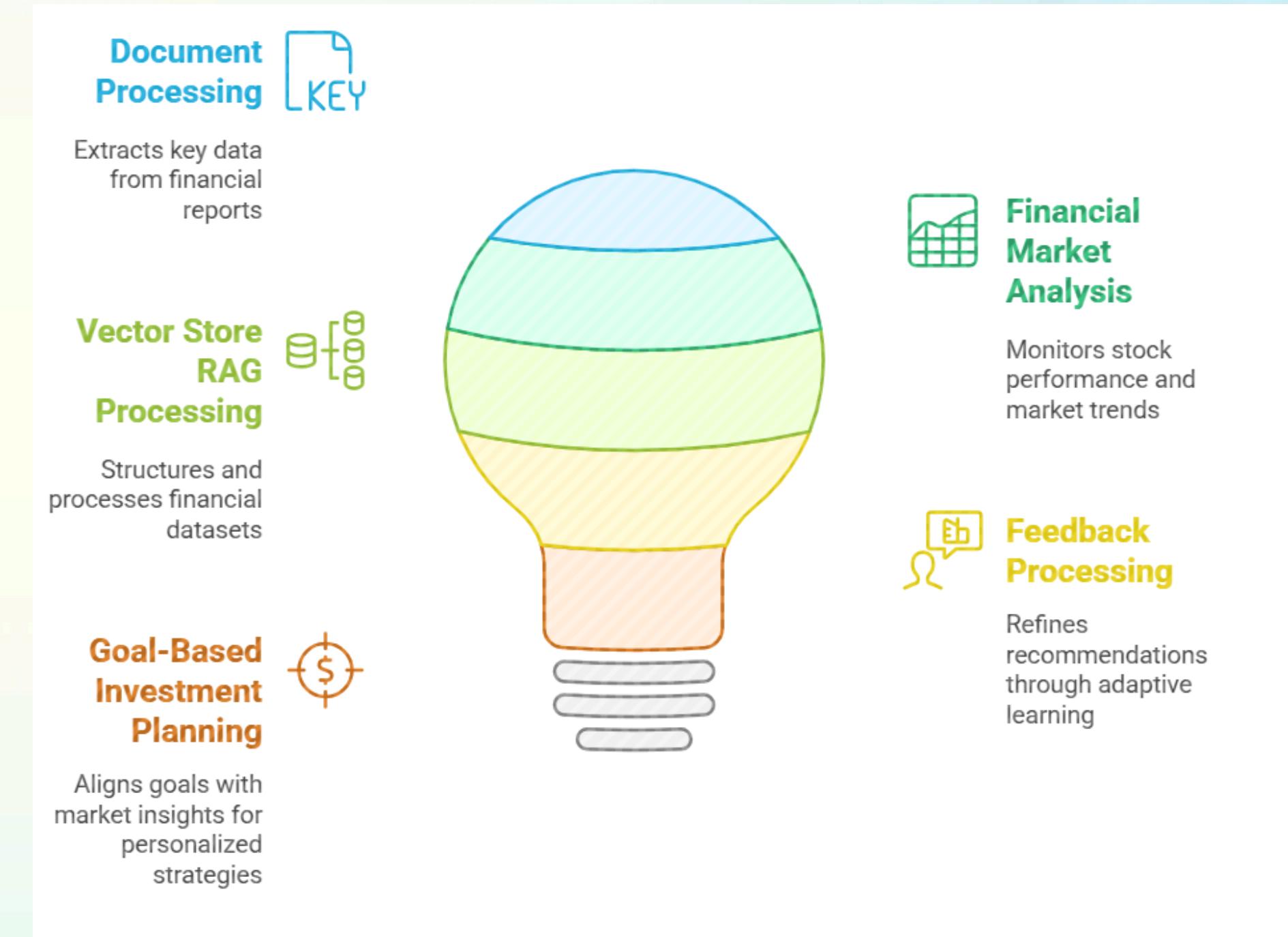
- Direct Stocks**: High-potential equity investments with direct ownership. [Learn more](#)
- Mutual Funds**: Diversified portfolios managed by financial experts. [Learn more](#)
- IPO Investments**: Early access to promising company offerings. [Learn more](#)
- ETF Funds**: Low-cost funds tracking market indices. [Learn more](#)
- Global Markets**: Diversify internationally across markets. [Learn more](#)
- Secure Options**: Capital protection with steady returns. [Learn more](#)

[View all investment options](#)



Uptiq Agent- Finwise AI Agent

FinWise AI is an advanced financial intelligence platform revolutionizing investment decision-making with AI-driven insights. It operates through five specialized sub-agents:



Future Objectives

- ◆ Web Integration – Integrate UPTIQ with a dedicated website, enabling seamless user access to investment insights, portfolio management, and strategy recommendations.
- ◆ Enhanced Personalization – Develop advanced AI models to deliver more tailored investment strategies, considering individual financial goals and market conditions.
- ◆ Automated Risk Management – Implement real-time risk assessment mechanisms to proactively mitigate financial risks and optimize portfolio performance.
- ◆ Scalability & Expansion – Extend the platform's capabilities to support a broader range of financial assets, market conditions, and global investment strategies.

