**FinBot – AI Financial Chatbot**

FinBot which is a python-based AI financial chatbot that provides responses to user queries (built based on pre-defined questions and results attained through Task 1 in the current Job simulation). This bot is designed in March 2025, and hence it only provides data prior to 3 years from now.

**Key functions performed:**

* The chatbot is designed to interact with the user by way of building conversation seeking their requirements. The areas that can be answered were provided even at the beginning to make sure the customer / user can gain relevant / desired information.
* The questions were framed on the segments of Revenue & Nete Income Analysis, Assets & Liabilities trends, Cash Flow & Financial Health, Compare Financial Trends etc.
* A few visualizations were also added to view for the customers; however, the interface was limited to Python only and hence developments were required to deploy it and make it more attractive.
* It was designed in a way to be polite, humble and user-friendly.

**Limitations:**

* Currently, it only deals with data relevant to specific timeline and specific companies.
* There was not real-time data and only answers very specific predefined questions.

**Future Improvements or Possible Developments:**

* Deploy the chatbot using a web App which would help us to provide the users with webpage / link instead of a Python code.
* Use UI / UX for design and implementation for the chatbot to personalize.
* Prepare more and wide range of questions that the bot can answer.
* Ensure that the bot is able to understand the query of the user irrespective of case sensitivity, spell mistakes, inconsistencies in phrasing the question etc.

**BCG GenAI Job Simulation on Forage - March 2025**

* Completed a job simulation involving AI-powered financial chatbot development for BCG's GenAI Consulting team.
* Gained experience in Python programming, including the use of libraries such as pandas for data manipulation.
* Integrated and interpreted complex financial data from 10-K and 10-Q reports, employing rule-based logic to create a chatbot that provides user-friendly financial insights and analysis.